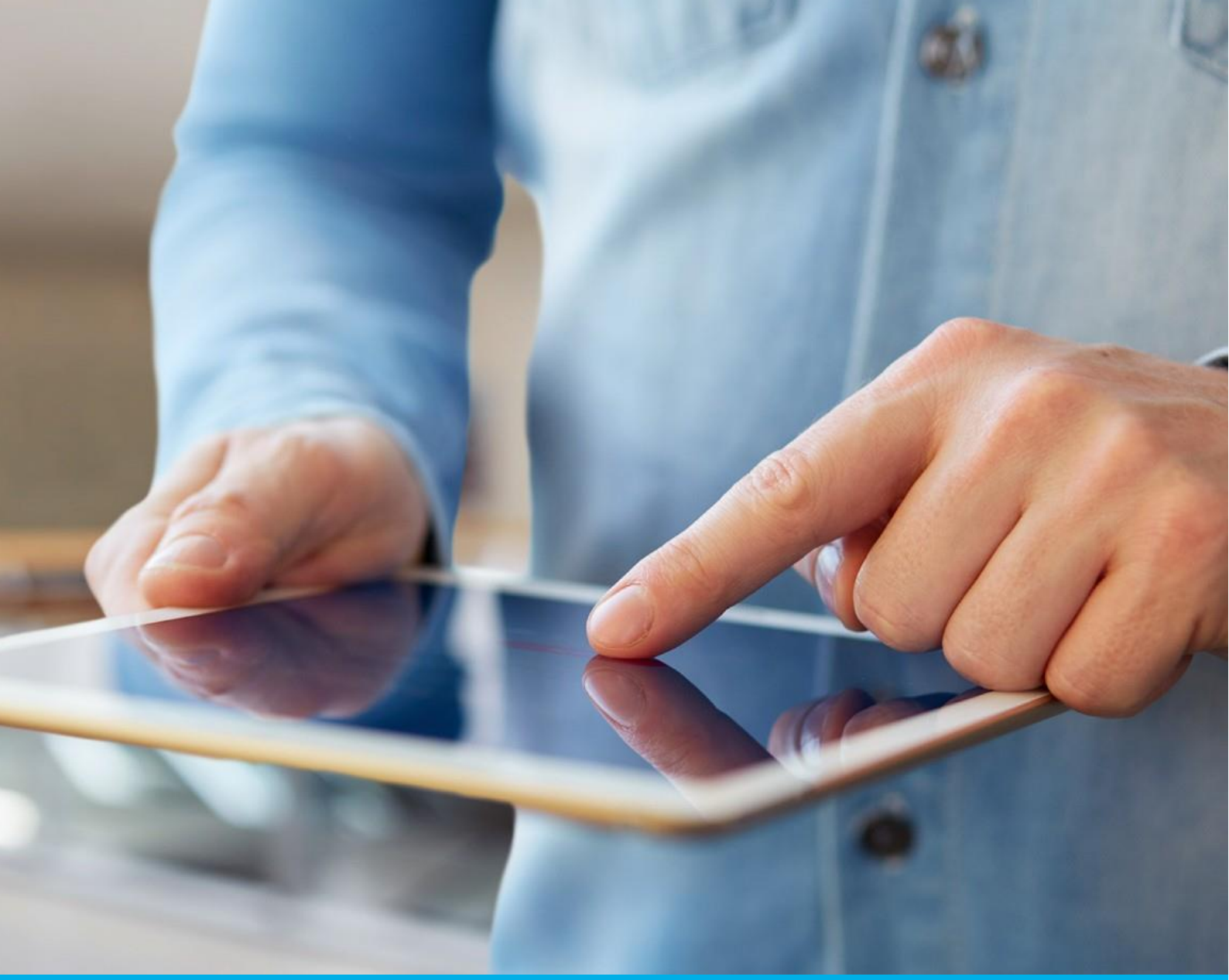

Certum e-Delivery – User Manual

asseco

Certum by asseco

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1. Legal information

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2. Introduction

The **Certum e-Delivery** service enables the handling of registered electronic mail in accordance with the requirements of the Act of November 18, 2020, on electronic deliveries (Journal of Laws 2020, item 2320). This manual presents the options offered within the Certum e-Delivery service, demonstrates the functionalities and features of the mailbox, and focuses on guiding the User through the processes of: sending consignment (in three modes: registered, registered with confirmation, registered with e-signature), receiving consignment (in three modes), extending the tariff plan, inviting a user or authorizing them within the User's mailbox. Each event in the mailbox triggers appropriate notifications, referred to as alerts.

3. Requirements

The **Certum e-Delivery** service is supported by a web browser.

IMPORTANT INFORMATION!

Supported browsers are:

- Google Chrome

Additionally, to generate one-time tokens used for logging in, it is necessary to have a mobile device with Android or iOS and the SimplySign application.

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4. Service activation

Activating the service requires identity verification using one of three methods:

- At a Partner Point – through an in-person meeting.
- With the mObywatel application or e-ID – used to confirm your identity.
- With a qualified electronic signature – used to sign the application for mailbox creation (this method does not support one-time signatures).

Upon successful identity verification, an account is created in the Certum e-Delivery service. After account creation, the necessary activation details are sent to the email address provided during identity verification.

5. Logging into the Service

STEP 1: To log in to the service, go to the website: https://edoreczenia.certum.pl. After accessing the website, the login window will appear, where the User must enter their login (email) and password. It is also possible to switch the service language between Polish and English. After entering the correct username and password and clicking the ,,***Continue***" button, the next window will appear.

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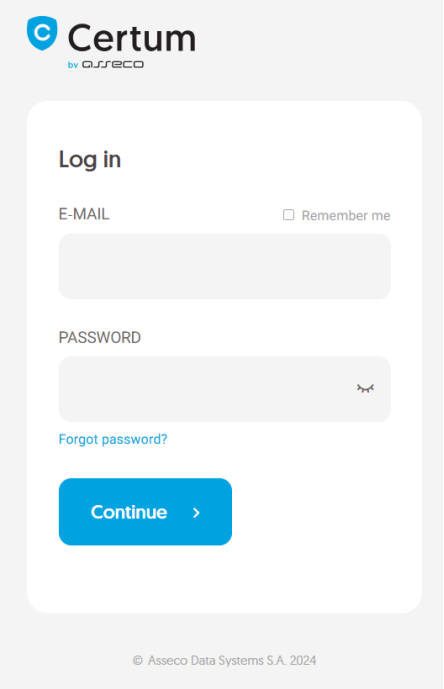

Figure 1: ***Logging into the Service – Step 1: Entering Username and Password.***

STEP 2: In the next window, as shown below, the User must enter a one-time token (code) generated in the SimplySign mobile application.

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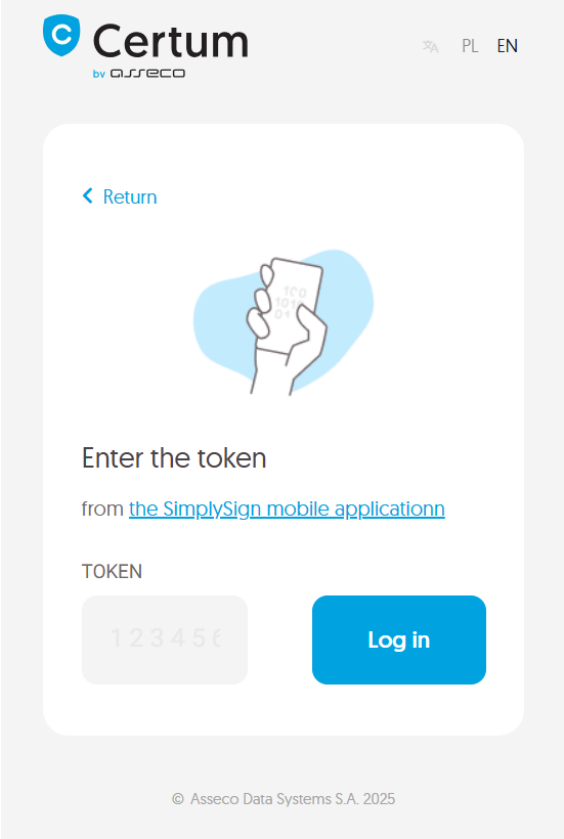

Figure 1.1: ***Logging into the Service – Step 2: Entering the One-Time Token***

STEP 3: After the User enters and confirms the correct token from the SimplySign mobile application, they will be logged into the Certum e-Delivery service. If the User has access to multiple mailboxes, a screen will appear where they must select the active mailbox.

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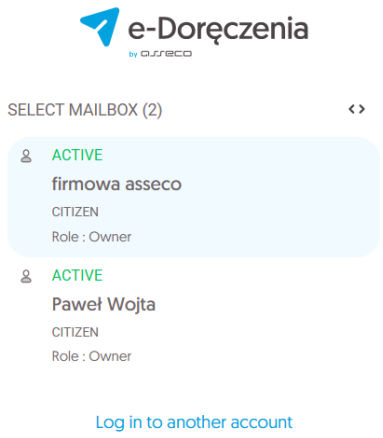

Figure 1.2: ***Logging into the Service – Step 3: Selecting the Mailbox***

Once the User has successfully logged into the mailbox, they will have access to the Panel, which allows them to manage the active mailbox. This is referred to as the ***"Main Panel"*** of the service.

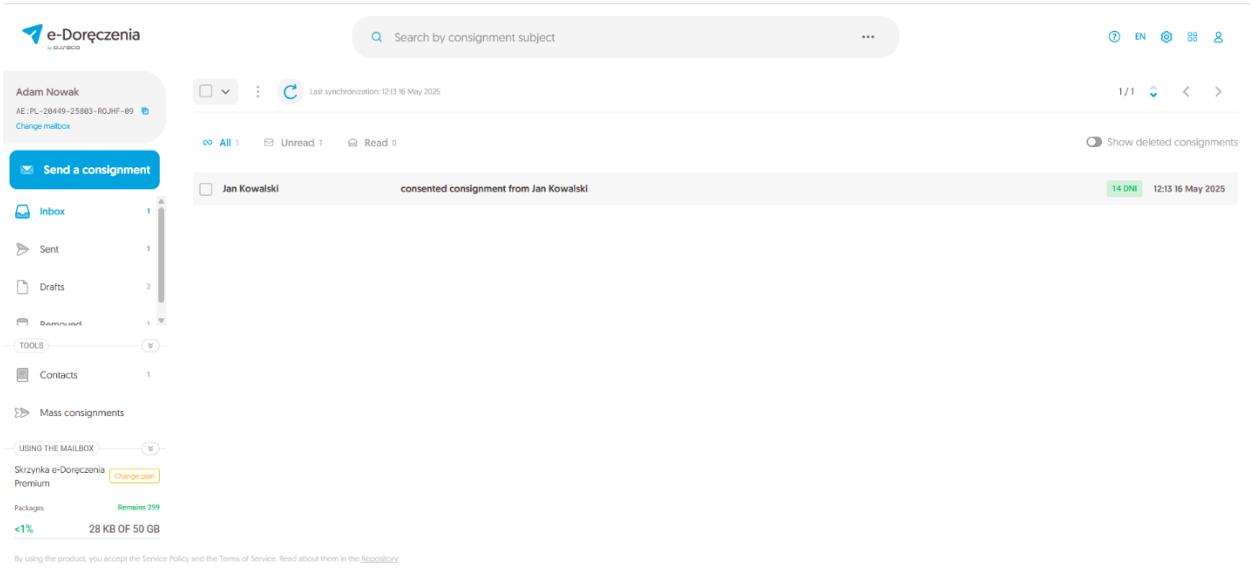

Figure 2: ***"Main Panel" of the Service*****.**

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The Main Panel of the Certum e-Delivery mailbox is divided into the following logical sections:

1. Consignment List.
2. Section for Changing the Active Mailbox.
3. Consignment Management Section, including:
    1. Creating consignment;
    2. List of received consignment;
    3. List of sent consignment;
    4. List of draft consignment;
    5. List of deleted consignment.
4. Tools Section, including:
    1. *"Contacts"*;
    2. *"Mass consignment"*.
5. A section showing the level of use of the box and the choice of tariff plan.
6. Section with auxiliary buttons:
    1. *“Help*";
    2. *“Change language”* – refers to the language in which the Panel is displayed;
    3. *“Settings*";
    4. links to ,*”Other Certum products*”;
    5. *“User*".
7. Consignment Finder.

The numerical labels in the illustration correspond to the sections described above.

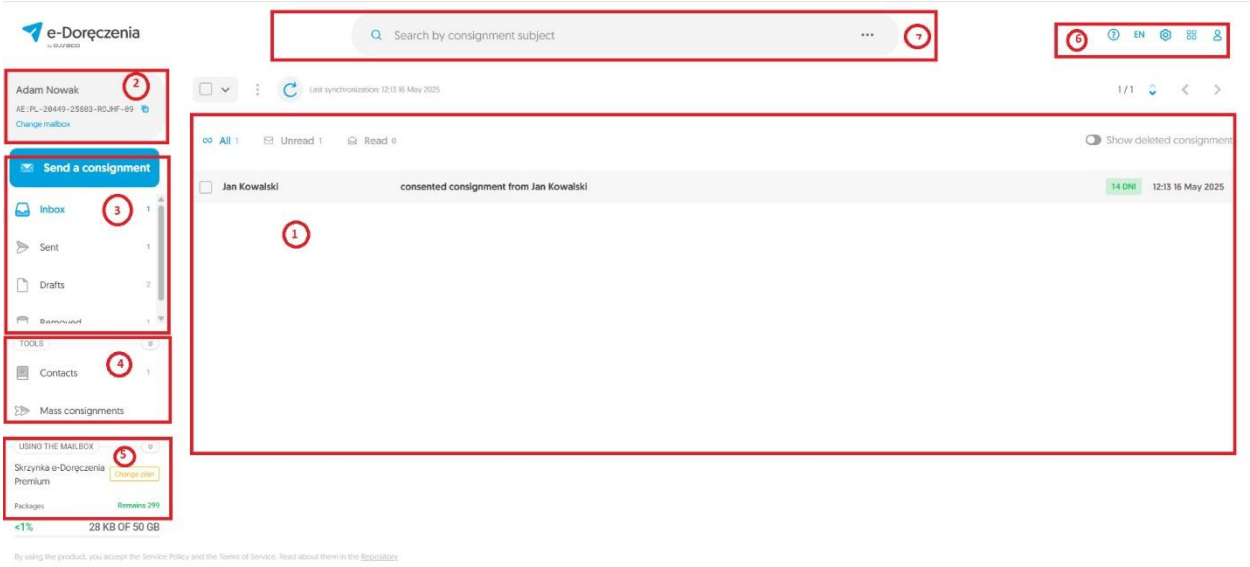

Figure 3: ***Main Panel of the Service – Section Breakdown***

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Section 2, which allows switching the active mailbox, contains additional hidden options. When the User clicks on this section, a dropdown window appears with mailbox details and available options. They are:

- mailbox information: name and status (active or inactive);
- ADE number with a quick copy option;
- mailbox owner details;
- status of correspondence with public institutions (enabled or disabled);
- number of received consignment,
- “Mailbox Settings” option;
- mailbox switch option;
- logout option.

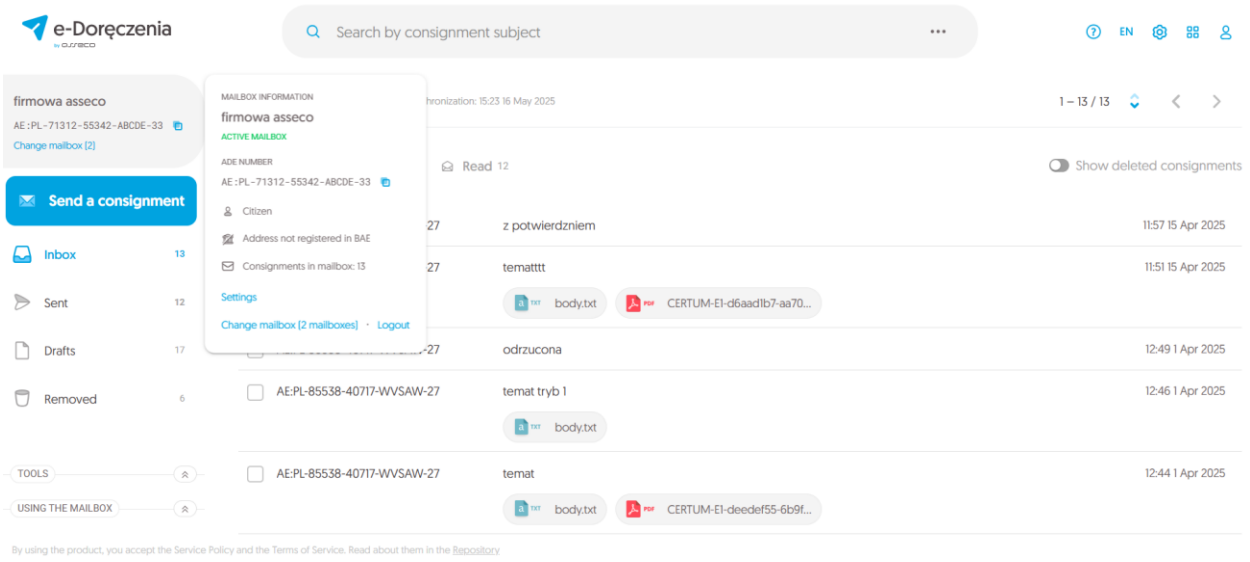

Figure 4: ***Mailbox Management Panel.***

6. *“Settings”*

When selecting the ***"Settings"*** option, the User is redirected to the ***"Settings"*** Panel, which is divided into the following tabs:

- *“General”*;
- *“Mailbox”;*
- *“Users”*;
- *“Notifications”*;

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- *“Folders”*;
- *“Labels”*;
- *“Rules”*;
- *“Tariff Plan”*;
- *“About application”*.

The following presented screen that will show when the option ,”***Settings***” is selected.

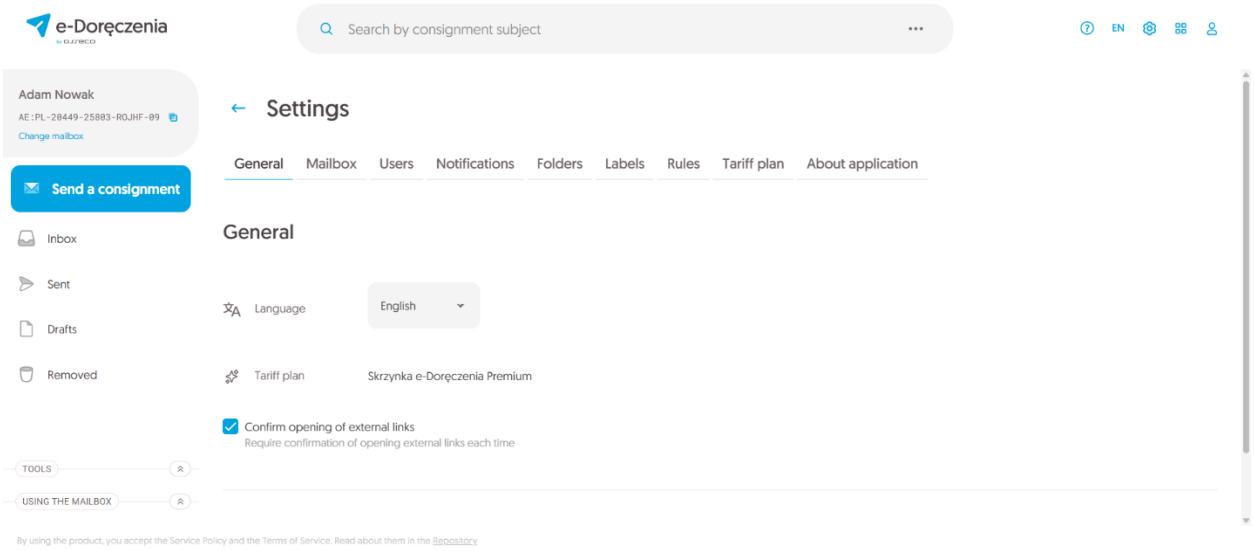

Figure 5: *Mailbox „Settings”.*

6.1 “General” Tab

In the “***General***" tab, the following options are available:

- changing the language in which the Panel is displayed – currently, Polish and English are available;
- information about the tariff plan assigned to the active mailbox;
- enabling/disabling the option to confirm each action of opening external links.

Below is the tab ,"***General***", which is the default tab when selecting the option ,"***Settings***".

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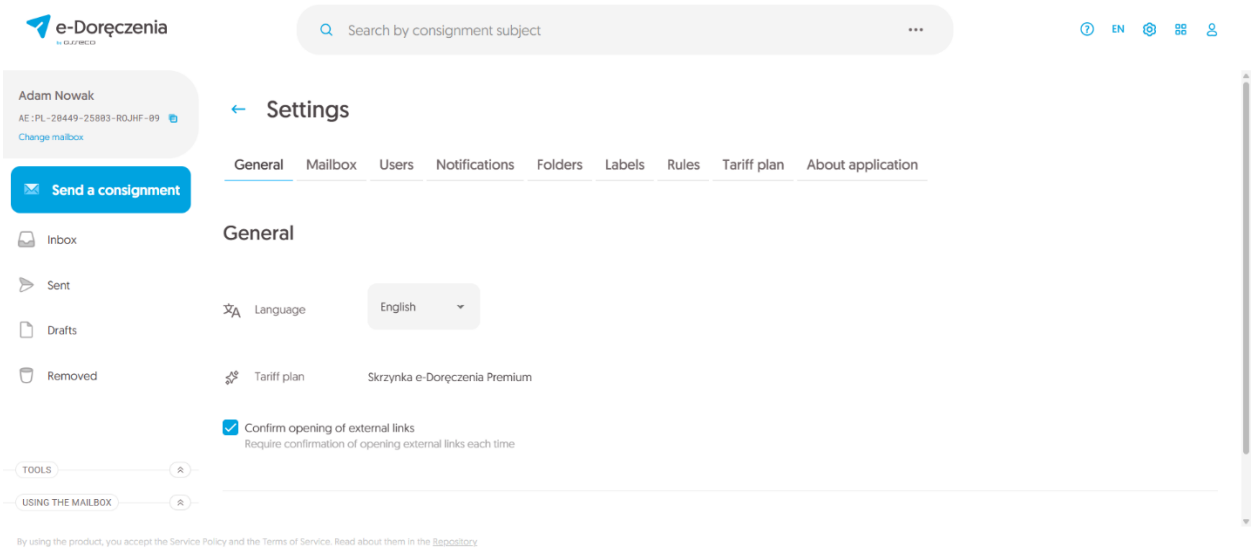

Figure 6: Settings - *"General" tab*.

6.2 "Mailbox" Tab

In the "Mailbox" tab, the following information about the currently selected mailbox is presented. The following can be found here:

- mailbox name;
- mailbox status information, e.g., active, mailbox being closed
- mailbox owner details;
- ADE address of the active mailbox (with an automatic copy address option);
- information about any mailbox extension;
- purchase history;
- option to change the tariff plan;
- type of tariff plan;
- dates of the selected tariff plan duration;
- historical data about the tariff plan usage;
- data regarding mailbox usage.

If the mailbox limit is exceeded, the User will receive the following notification:

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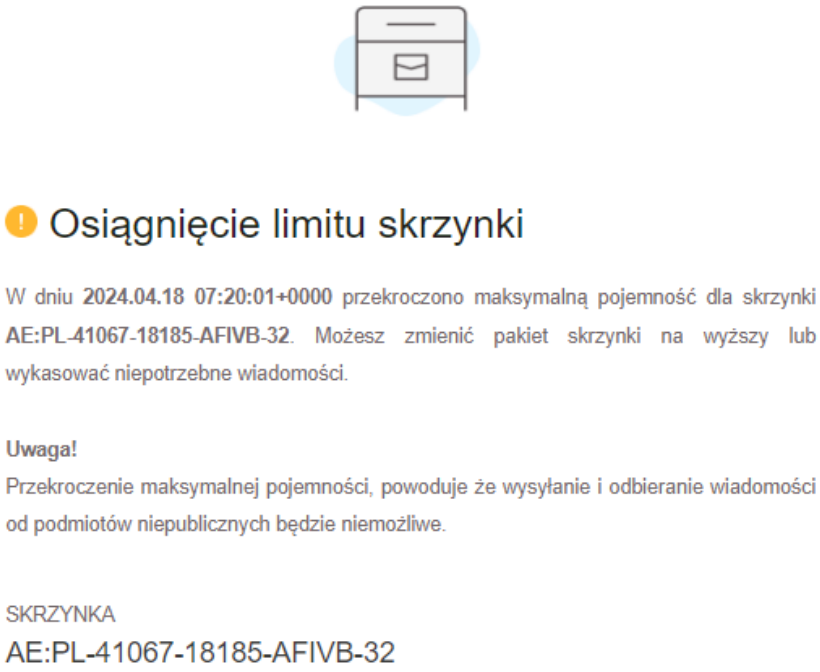

Figure 7: ***Notification of reaching the mailbox limit*****.**

How to Change the tariff plan?

To change the subscription to another one, select the ***"Change Subscription"*** option, which is located below the active mailbox usage details.

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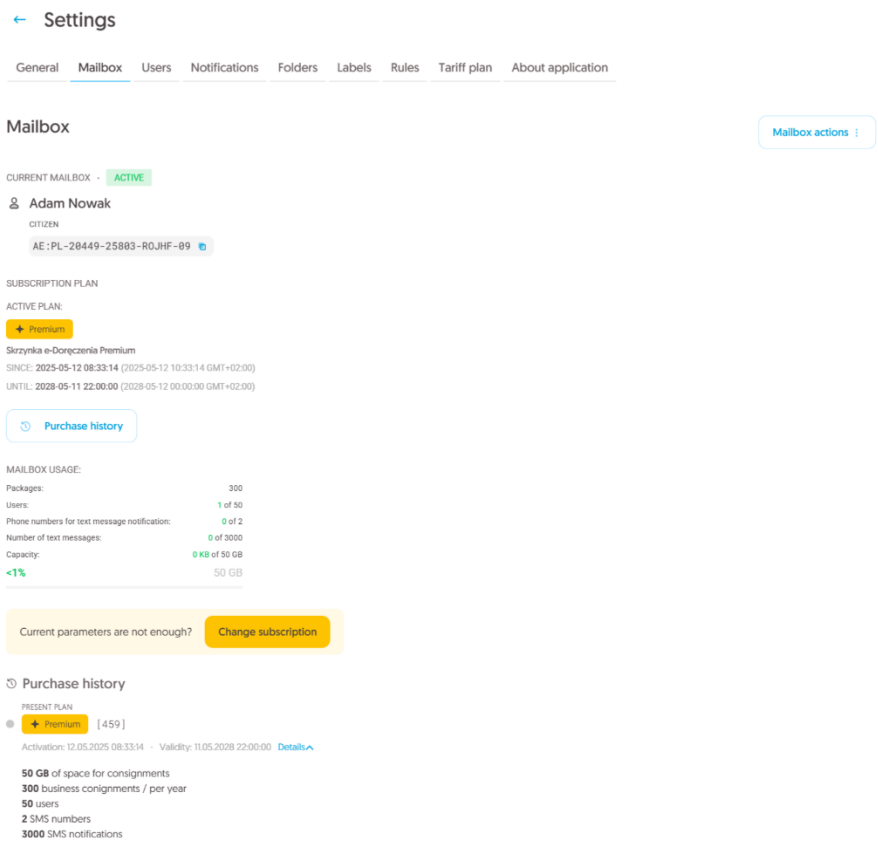

Figure 8: Settings - *"Mailbox" Tab*.

If the current mailbox tariff plan is nearing its end, the User will receive a notification via email regarding the expiring plan and the date until the current plan is valid.

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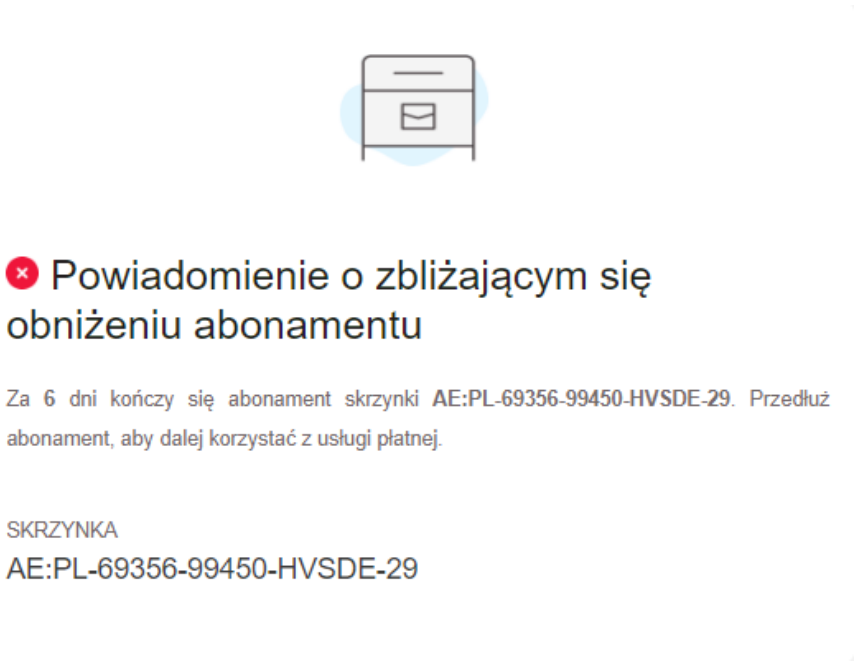

Figure 9: ***Notification regarding the expiring active mailbox plan.***

If the User does not take any action and does not purchase a new paid plan, the mailbox will switch to a free subscription.

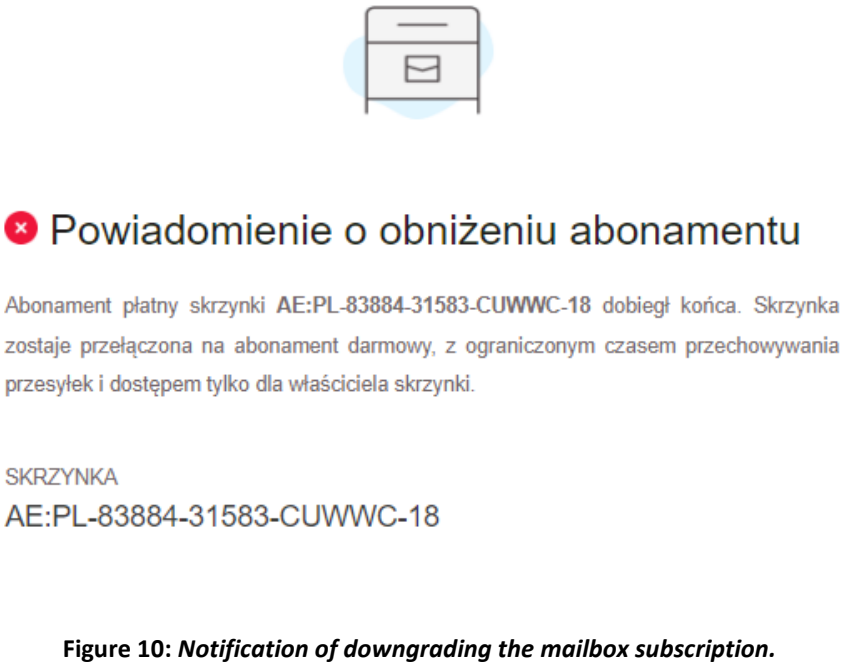

Figure 10: ***Notification of downgrading the mailbox subscription.***

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However, if the User decides to purchase a different tariff plan, selecting the ***"Change Subscription"*** option in ***"Settings"*** will redirect them to the ***Certum store page***: https://sklep.certum.pl/e-doreczenia-certum-przedluzenie-lub-zmiana-planu.html . There, they can continue the process of purchasing a new plan for their mailbox.

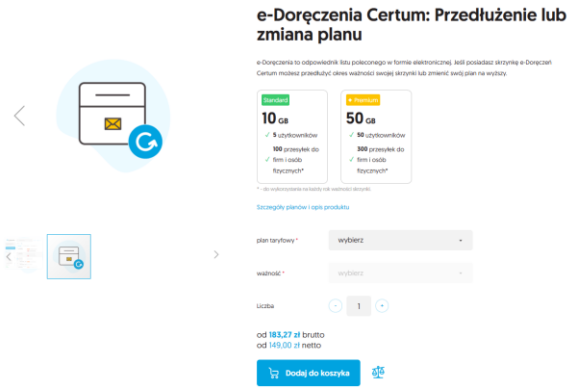

Figure 11: ***Process of purchasing a new mailbox tariff plan*****.**

If the User:

- has a Free mailbox without the free package for sending mail to non-public entities and individuals

OR

- has a Standard or Premium mailbox but wants to purchase additional mail,

They can do so via the following page: https://sklep.certum.pl/e-doreczenia-przesylki.html.

Below is the process of purchasing a mail package.

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Figure 12: ***Mail package purchase process.*.**

6.2.1 *"Purchase History"* Section

In this section, Users can find information about:

- *"PastPlans"*;
- "*Present Plans*";
- "*Upcoming Plans*."

For each plan, details are provided regarding the service activation date, expiration date, and the tariff plan code.

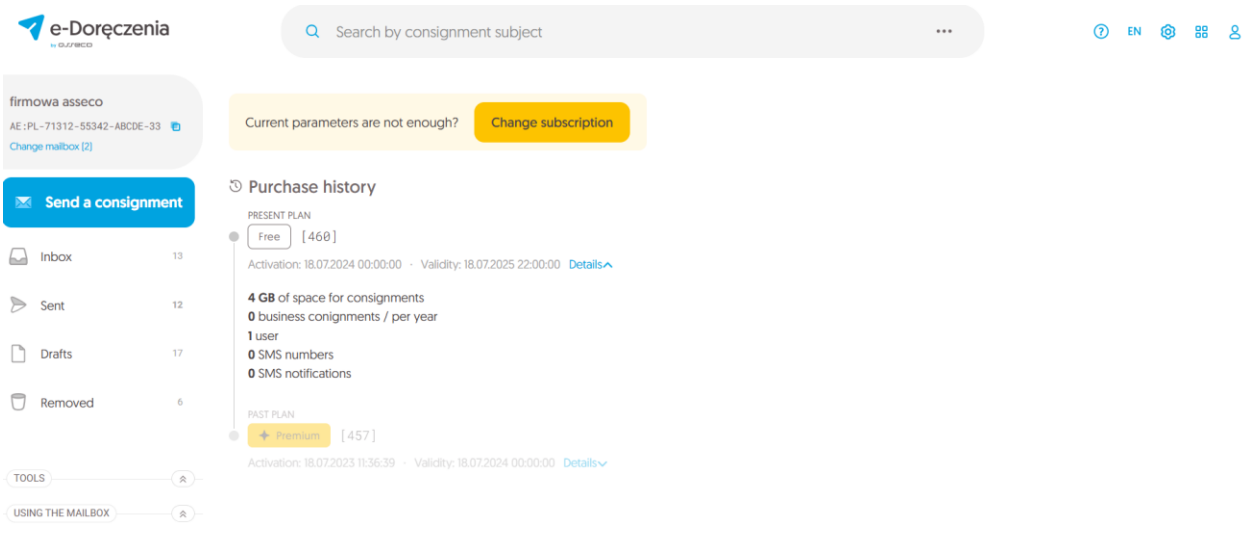

Figure 13: ***Settings – "Mailbox" Tab – "Purchase History" Section***

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This tab also allows expanding an additional settings panel by selecting ***"Mailbox Actions"***, It is located on the right side of the window view. To expand it, click on it.

You can find options such as:

- *"Switch Name,"*
- *"Rename Name,"*
- "*Enable Correspondence with Public Institutions,*"
- "*Suspend Mailbox,*"
- “Mailbox Usage Report,”
- “Purchase a New Mailbox,”
- *"Close Mailbox."*

NOTE

The ADE Owner role also has access to the ***"Close Mailbox"*** option. This allows Users to completely resign from the Certum e-Delivery service and PERMANENTLY close the selected mailbox.
NOTE: This action is irreversible. Once closed, the mailbox cannot be restored.

When the User selects this option, an email will be sent to the notification email address provided in the “***Settings***.” The email will contain information about the initiation of the mailbox closure process, including the date when the User will completely lose access to the service. Additionally, another email will be sent with a link to download mail along with their proofs from the closing mailbox. The email will also specify the deadline for downloading the archived data.

Below is an example of the email received by the User upon the initiation of the mailbox closure process.

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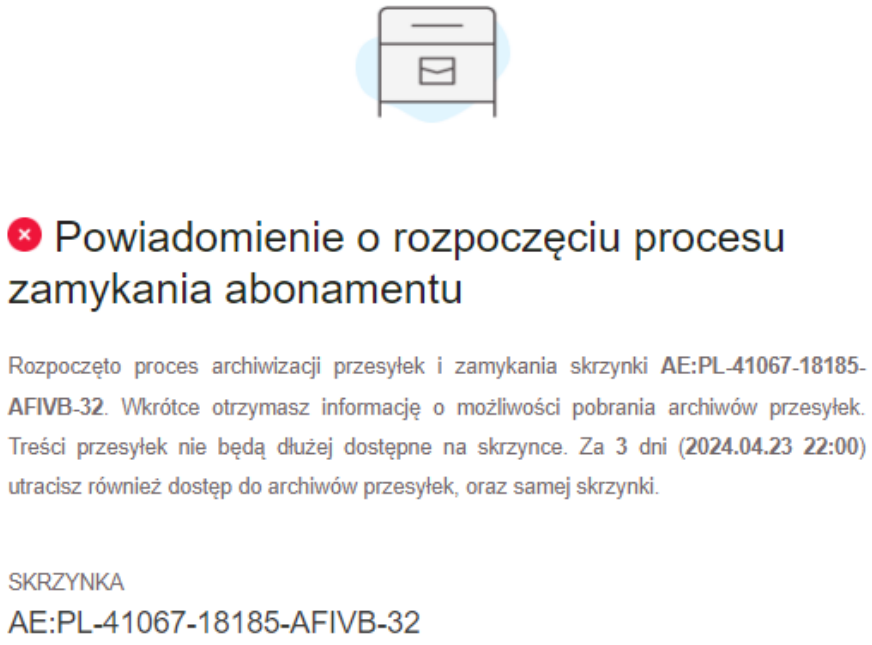

Figure 14: ***Notification regarding the mailbox closure process.***

Once the archiving process of mail is completed, the User will receive the following email containing a link to the archived data:

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Powiadomienie o zarchiwizowaniu przesyłek skrzynki

Zakończono proces archiwizacji przesyłek ze skrzynki **AE:PL-86374-64676-JEJUW-19**. Treści przesyłek nie są już dostepne na skrzynce. Możesz je pobrać, wraz z dowodami ich przetwarznia, z następujących adresów https://edoreczenia.dev.certum.pl/pxy?resource=https://pliki.edoreczenia.dev.certum.pl/AEPL-86374-64676-JEJUW-19/archive/CERTUM-MS-d917d8c2-6983-4652-8ab0-ce7099d99475------CERTUM-MS-62c5d7fb-8b5b-4b41-84b9-5d46bc0e732c.zip przez **20**. Po tym czasie utracisz również dostęp do archiwów, oraz samej skrzynki.

DOWÓD

CONSIGNMENTS_CONTENT_ARCHIVE_EXPORTED : Zarchiwizowanie przesyłek skrzynki

DOWÓD POWSTAŁY: 2024.02.26 14:23:13+0100

PRZESYŁKA NADANA: null

OD (ADE):

AE:PL-86374-64676-JEJUW-19

DO (ADE):

Figure 15*: Notification about the archiving of mail in the mailbox*

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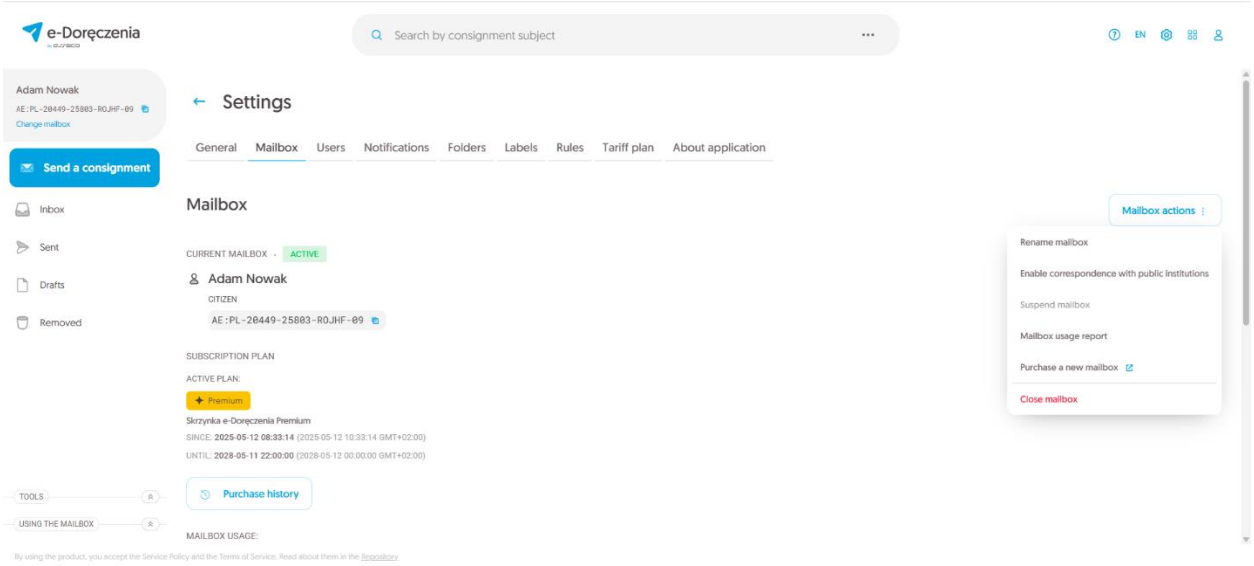

Figure 16: Settings – "Mailbox" Tab – Option – "Mailbox Actions"

6.3 "*Users*" Tab

This tab contains information about the person currently logged into the account on the active mailbox, an option for inviting and authorizing users, as well as the ability to manage individuals using the mailbox.

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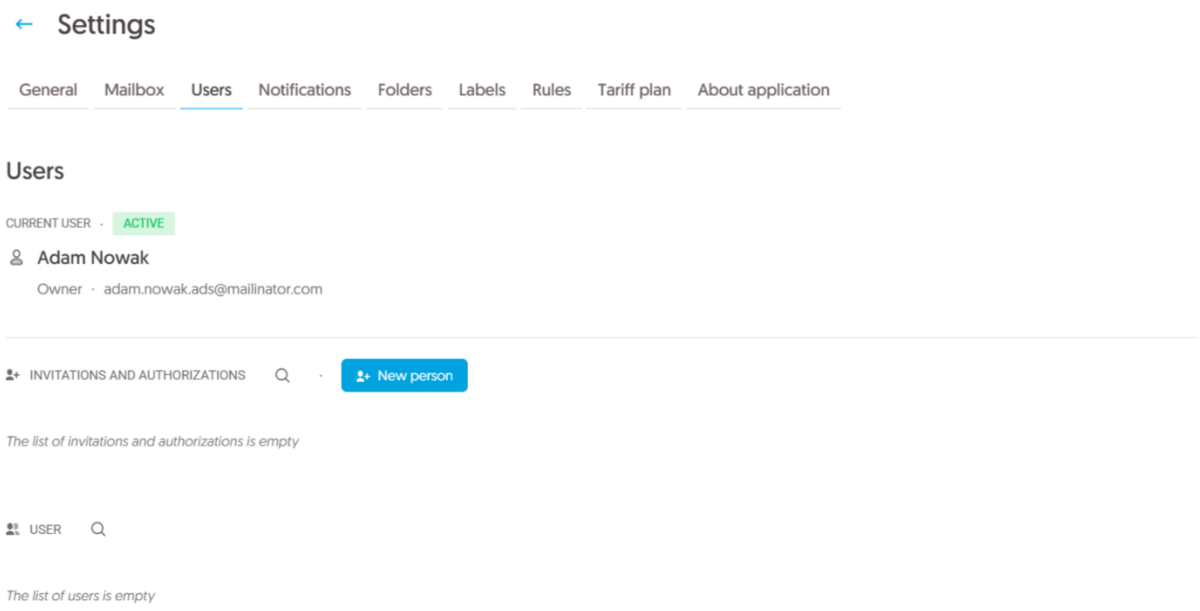

Figure 17: *Settings – "Users" Tab*

6.3.1 *"Current User"* Section

In the ***"Current User"*** section, information is displayed regarding the role of the logged-in user and the email address through which they were invited to the active mailbox.

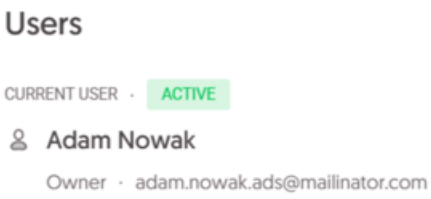

Figure 18: *Settings – "Users" Tab – "Current User" Section*

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6.3.2 *"Invitations and Authorizations"* Section

This section displays information about individuals who have been invited under the ***"Users"*** section to manage the active mailbox.

Users can withdraw an invitation or check how many days remain for its acceptance.

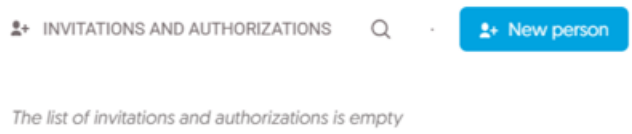

Figure 19: ***Settings – "Users" Tab – "Invitations and Authorizations" Section.***

A detailed guide on inviting and authorizing users to manage the mailbox is provided in the **"Invitations and Authorizations"** section.

6.3.3 *"Users"* Section

This section provides options for inviting and authorizing other users to fulfill selected roles within the active mailbox.

Figure 20: ***Settings – "Users" Tab – "Users" Section***

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6.4 *"Notifications"* Tab

This tab allows users to add and remove channels through which notifications can be received. Notifications inform the user about events, updates, or necessary actions related to the mailbox.

Currently, notifications can only be set up through:

- e-mail address – available in all plans,
- notification phone number (1) – availability depends on the selected plan,
- notification phone number (2) – availability depends on the selected plan.

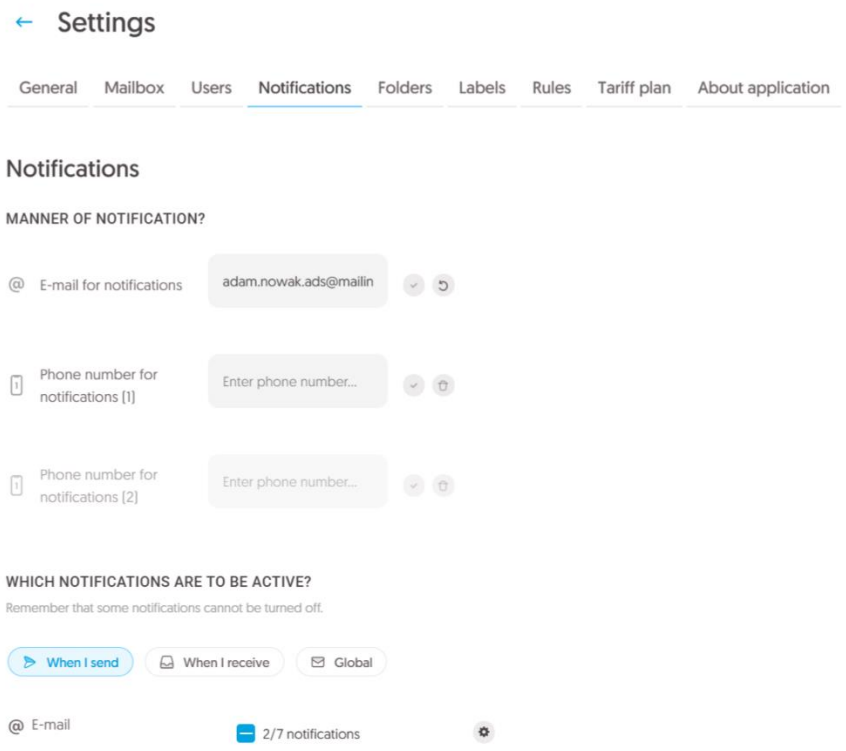

Figure 21: ***Settings – "Notifications" Tab***

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6.4.1 *“Manner of Notification?”* Section

In the *"E-mail for notification"* field, users must enter the email address where all notifications regarding the selected active mailbox will be sent.

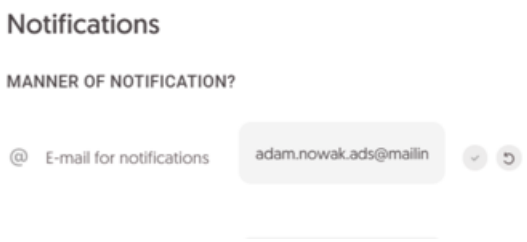

Figure 22: ***Settings – "Notifications" Tab – "Notifications" Section " E-mail for notification" Field***

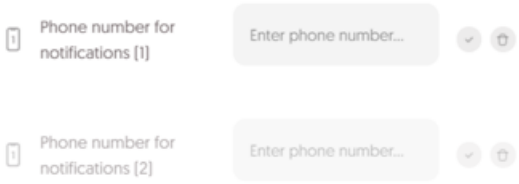

Figure 23: ***Settings – "Notifications" Tab – "Notifications" Section – "Phone number for notification " Field.***

To receive notifications via phone, the number must be entered as a 9-digit sequence, without the country code (e.g., +48). To confirm the entered data, select the *"checkmark"* icon. To delete the saved data, select the *"trash bin"* icon.

6.4.2 *" Which notifications are to be active?"* Section

This section categorizes notifications into three logical sub-tabs:

- *“When I send*";
- *“When I receive*";
- *“Global*".

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Sub-tab – *"When I send"*

This section allows users to configure notifications related to sending mail.

To adjust selected notifications, click the gear icon – a window will appear, allowing you to enable/disable specific notifications.

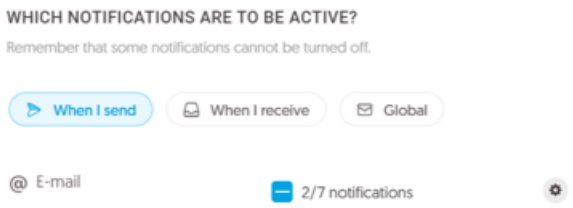

Figure 24: ***Settings - Tab - "Notifications" - Sub-tab - "When I Send".***

Some of them are default settings. They are set permanently and cannot be turned off. This is due to the regulations imposed on the e-Delivery service.

- Default notifications - marked with a white background – **Figure 37**: *Sub-tab - "When I Send" - checkbox - "Default Notifications".*
- Optional notifications - when enabled, are marked with a blue background – **Figure 38**: *Sub-tab - "When I Send" - checkbox - "Select Additional Notifications"*.
- For each group, the number of enabled notifications and the total number of possible notifications for that group are displayed next to each notification channel.

Available types of notifications related to sending consignment:

- *"Acceptance of package sending"*;
- "Rejection of package sending";
- "Issuance of Confirmation of Sending*";*
- "Issuance of Confirmation of Receipt*";*
- "Download evidence of Expiration of time to accept/reject package*";*
- "Download evidence of Package delivery*";*
- "Download evidence of Package delivery error*".*

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Below are the notifications that are set by default:

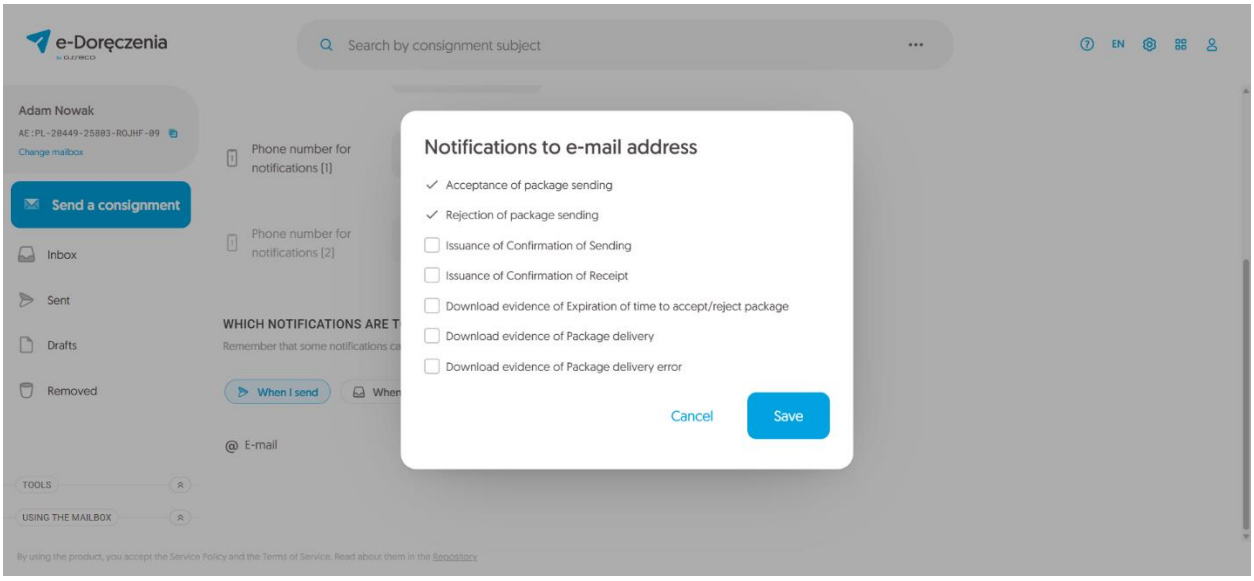

Figure 25: ***Settings - Tab - "Notifications" - Sub-tab - "When I Send" - checkbox - "Default Notifications".***

Below are the notifications that have been additionally selected, in addition to the default settings:

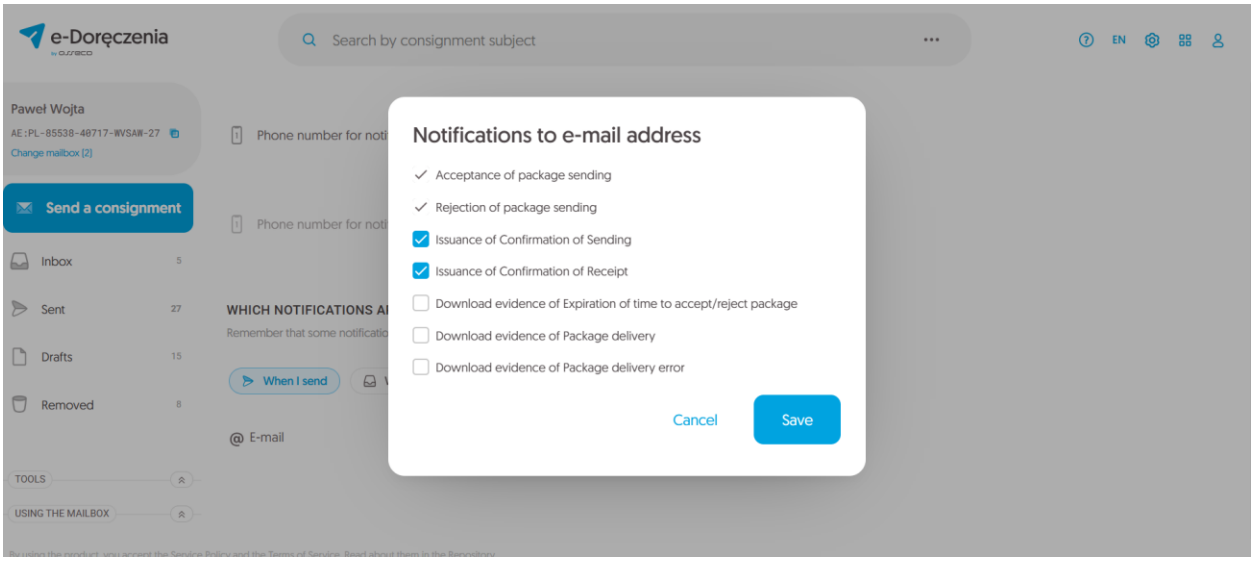

Figure 26: ***Settings - Tab - "Notifications" - Sub-tab - "When I Send" - checkbox - "Select Additional Notifications".***

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Sub-tab - *"When I Receive"*

This section sets notifications related to receiving mail. To set the selected notifications, click the gear icon – a window will appear allowing you to enable/disable specific notifications.

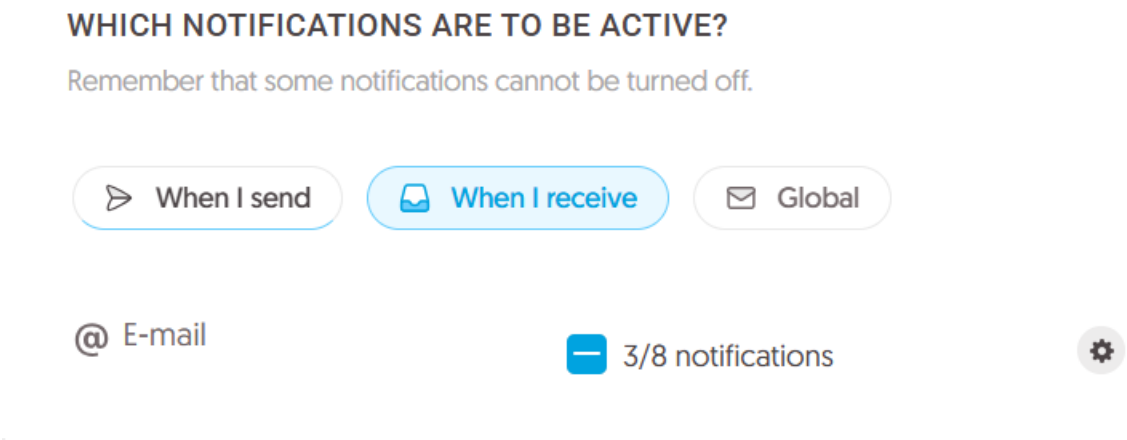

Figure 27: *Settings - Tab - "Notifications" - Sub-tab - "When I Receive".*

Some of them are default settings. They are set permanently and cannot be turned off. This is due to the regulations imposed on the e-Delivery service.

- Default notifications - marked with a white background – **Figure 40**: *Sub-tab - "When I Receive" - checkbox - "Default Notifications".*
- Optional notifications - when enabled, are marked with a blue background – **Figure 41**: *Sub-tab - "When I Receive" - checkbox - "Select Additional Notifications".*
- For each group, the number of enabled notifications and the total number of possible notifications for that group are displayed next to each notification channel.

The available types of notifications related to receiving mail are:

- *"Receipt acceptance required"*;
- "Acceptance of pre-delivery note*";*
- "Rejection of pre-delivery note*";*
- "Expiration of time to accept/reject package*";*
- "Remove package*";*
- "Notification of readiness of package receipt*";*

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- "Delivery of the package";
- "Package delivery error";

Below are the notifications that are set by default:

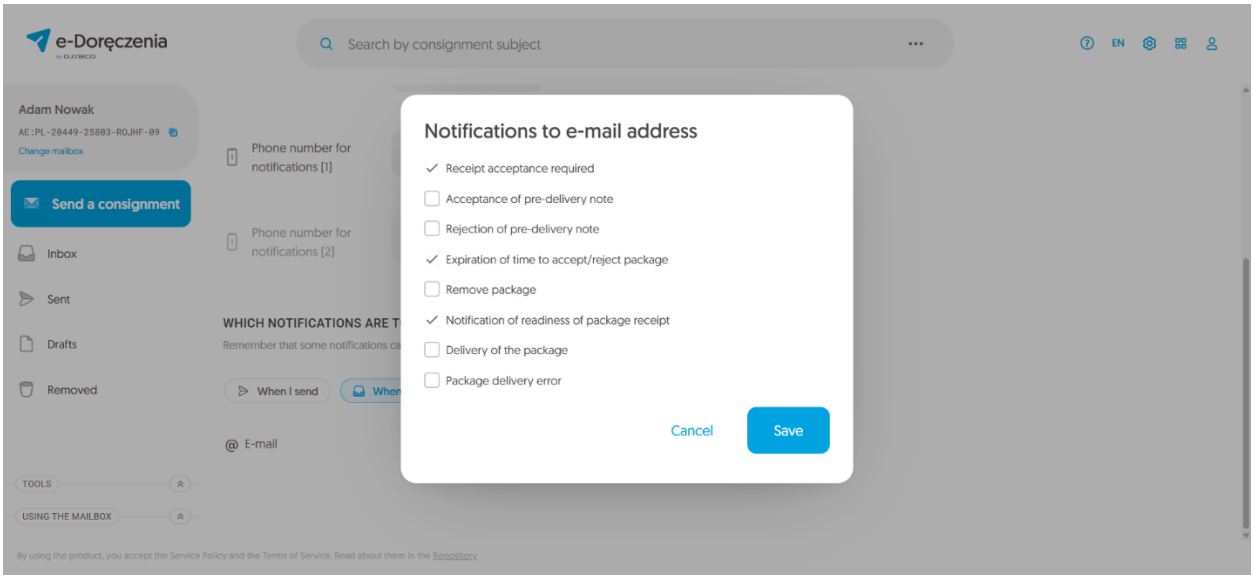

Figure 28: *Settings - Tab - "Notifications" - Sub-tab - "When I Receive" - Default notifications*".

Below are the notifications that have been additionally selected, in addition to the default settings:

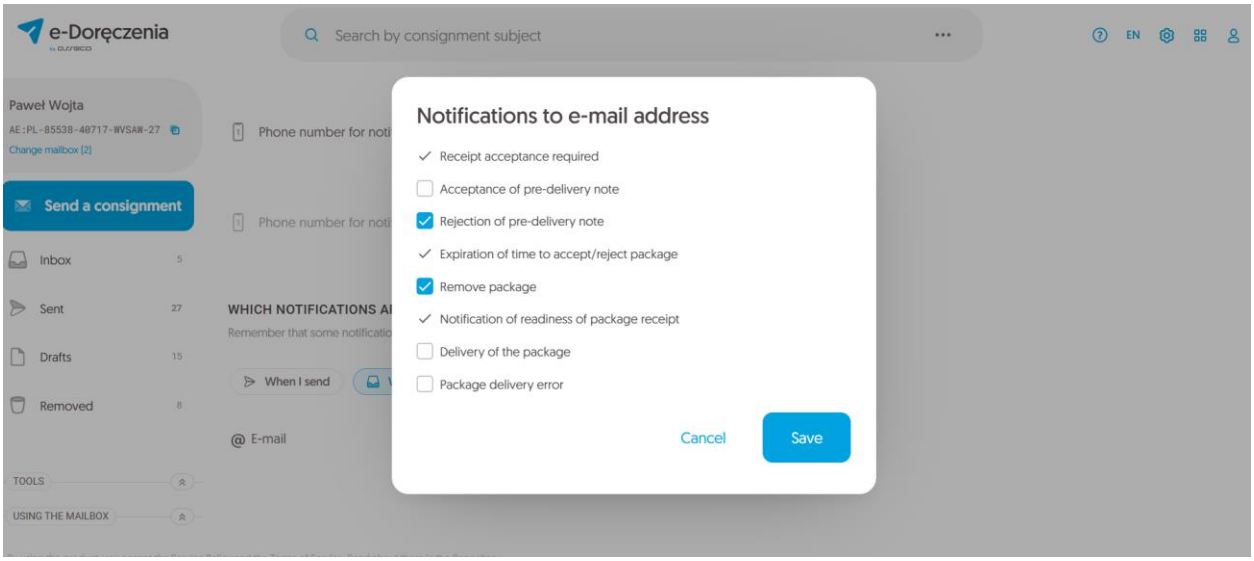

Figure 29: *Settings - Tab - "Notifications" - Sub-tab - "When I Receive" - checkbox - "Select Additional Notifications".*

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***"Global"* Sub-tab -**

This section sets the global notifications associated with the active mailbox.

To set the selected notifications, click the gear icon – a window will appear allowing you to enable/disable specific notifications.

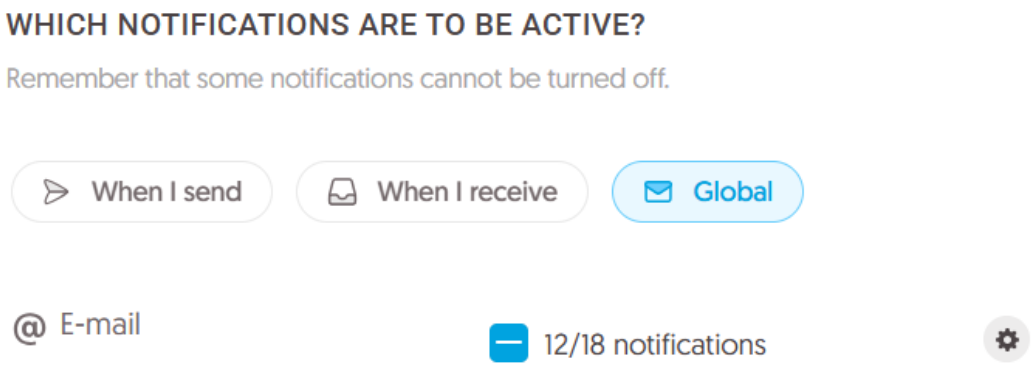

Figure 30: *Settings - Tab - "Notifications" - Sub-tab - "Global*."

Some of them are default settings. They are set permanently and cannot be turned off. This is due to the regulations imposed on the e-Delivery service.

- Default notifications - marked with a white background – **Figure 43**: *Sub-tab - "Global" - checkbox - "Default notifications*."
- Optional notifications - when enabled, are marked with a blue background – **Figure 44**: *Sub-tab - "Global" - checkbox - "Select Additional Notifications*."
- For each group, the number of enabled notifications and the total number of possible notifications for that group are displayed next to each notification channel.

There are possible types of global notifications for the mailbox:

- "Notification email address change";
- "Notification phone number change";
- "Notify about change privilege";

- “*Notification of completion of mail export*";
- “Notify about consignments content exported“;
- “Authorize user“;
- “Mailbox invitation expiration“;
- “Mailbox has been closed“;
- “Notify about mailbox closure process beginning“;
- “Notify about upcoming subscription expiry“;
- “Subscription downgrade“;
- “Notify about upcoming subscription downgrade“;
- “Notify about mailbox name change“;
- “Notify about mailbox policy updated“;
- “The 4 GB limit for the mailbox has been exceeded“;
- “The 4 GB limit for the mailbox has been reached“;
- “Notify about suspend privilege“;
- “Notify about unsuspend privilege“.

Below are the notifications that are set by default:

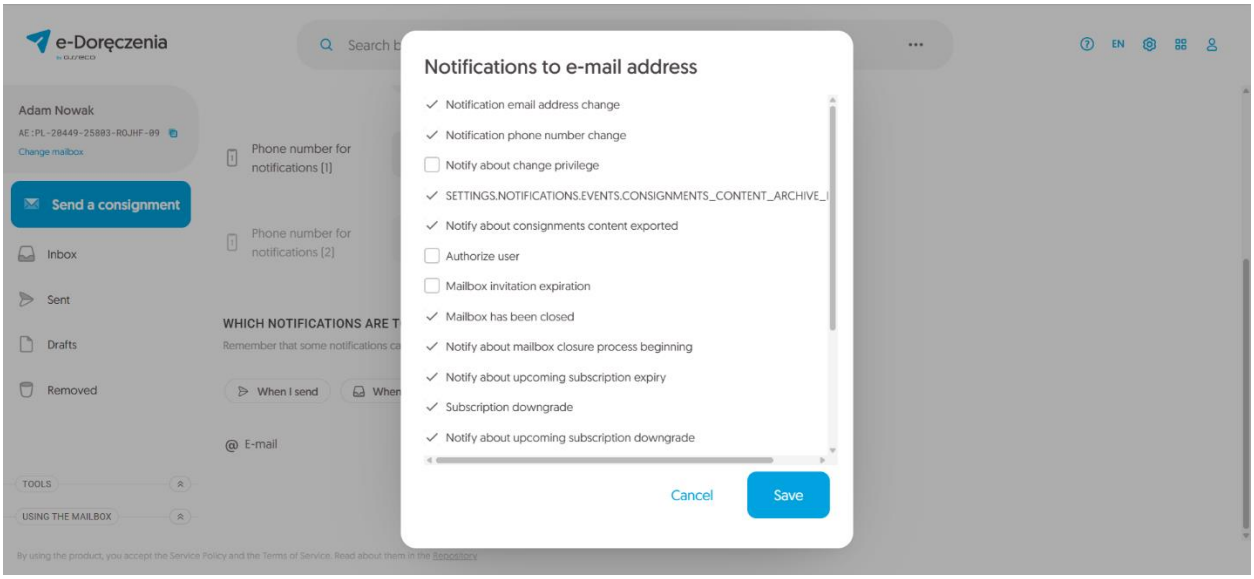

Figure 31: *Settings - Tab - "Notifications" - Sub-tab - "Global" - checkbox - "Default Notifications".*

Below are the notifications that have been additionally selected, in addition to the default settings:

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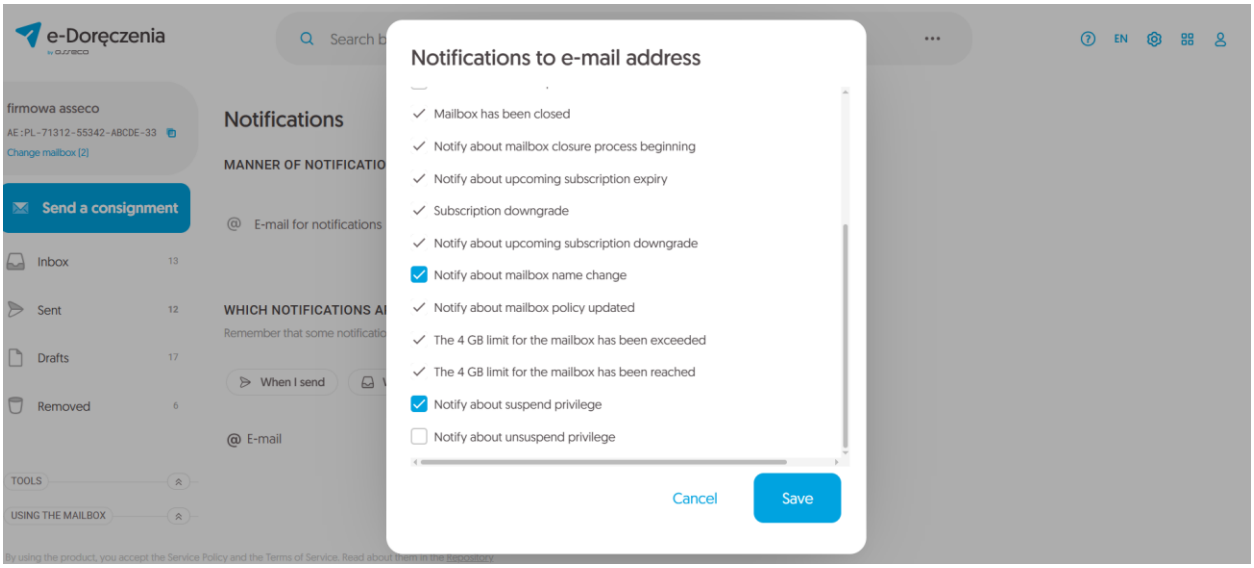

Figure 32: ***Settings - Tab - "Notifications" - Sub-tab - "Global" - checkbox - "Select Additional Notifications".***

6.5 "*Folders*" Tab.

STEP 1: In the "***Folders***" tab it is possible to manage additional folders. To create an additional folder by which to further segregate mail, select the option "***Add folder***" in the section above.

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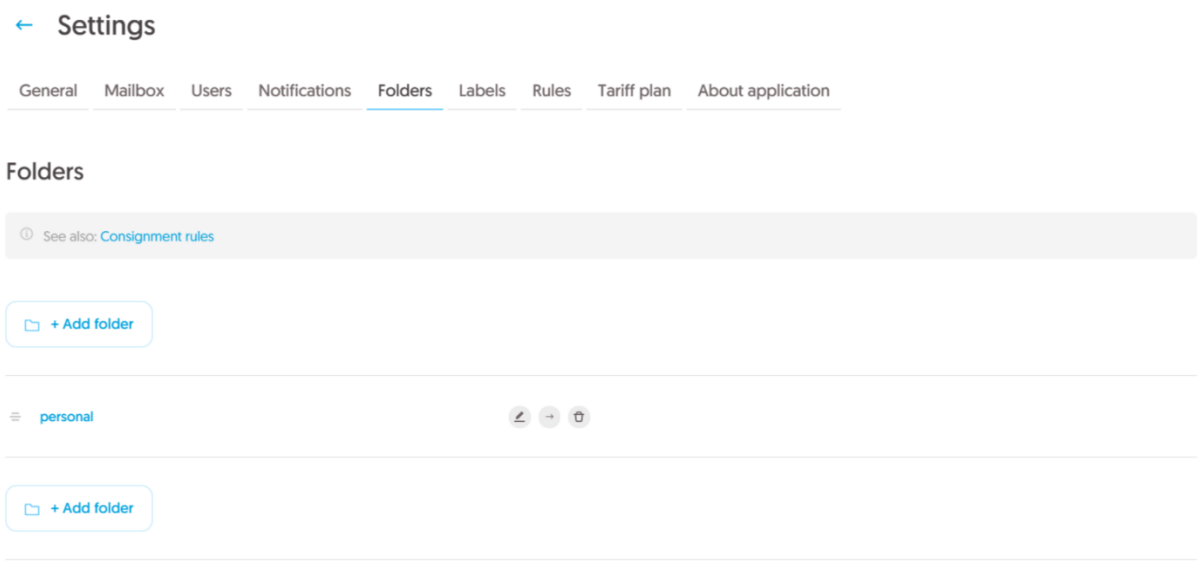

Figure 33: ***Settings - Folder creation - step 1.***

STEP 2: Enter the selected folder name. To create a new folder that will be visible in the folder list, select the option ”***Add***".

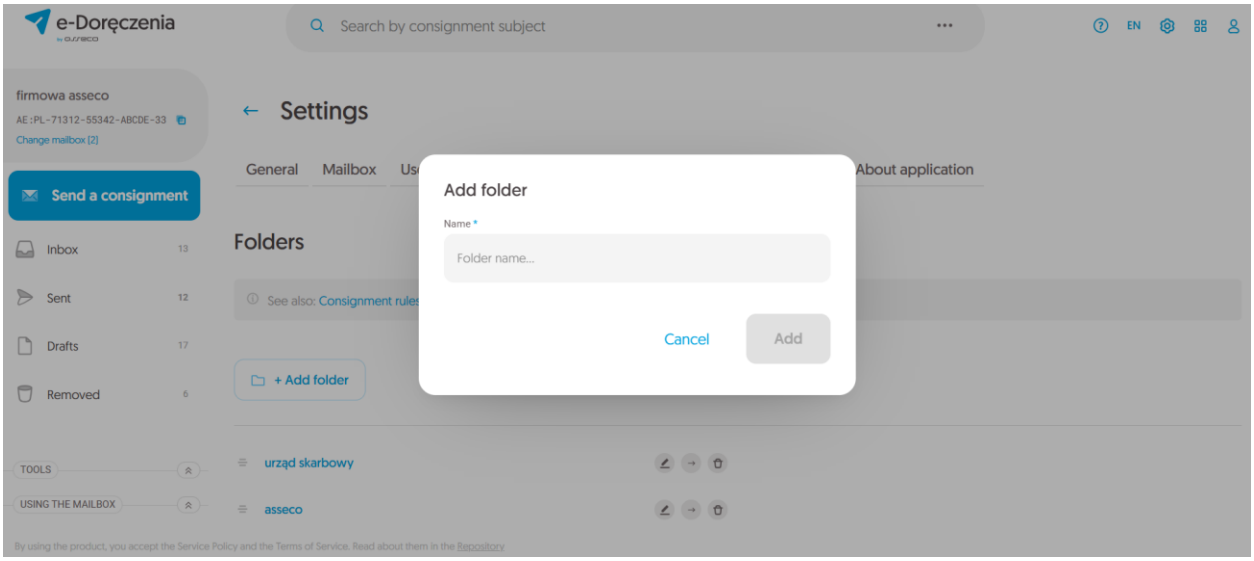

Figure 33.1: ***Settings - Folder creation - step 2.***

STEP 3: At this point, the list shows the folder created in the earlier steps of the instruction.

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Subsequent additional options are available for the created folder:

- the "***Rename folder***" option;
- the "***Search***" option;
- the "***Remove folder***" option.

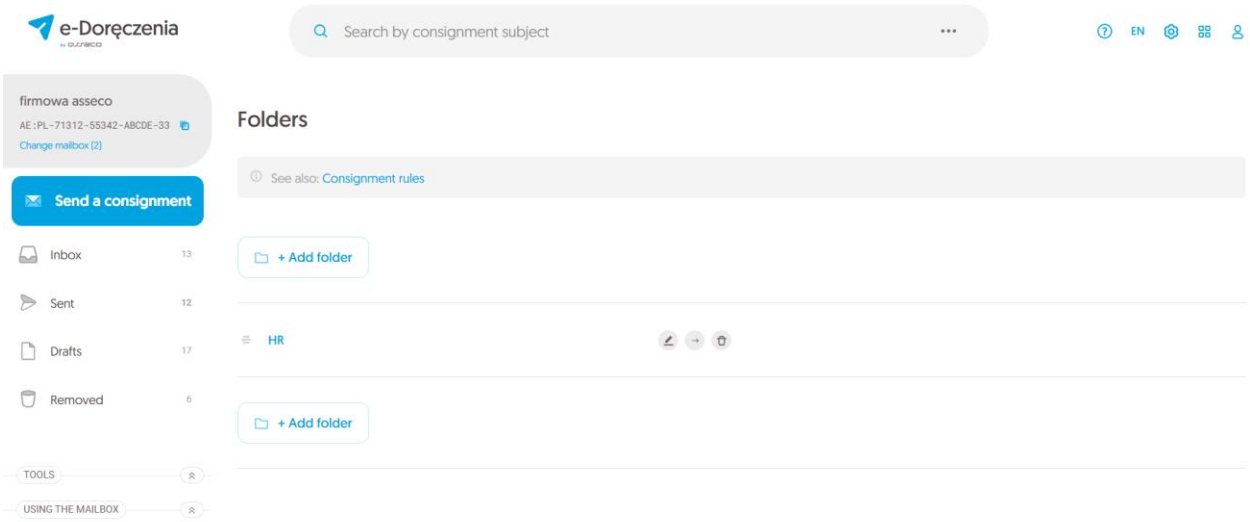

Figure 33.2: ***Settings - Folder creation - step 3.***

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6.6 "*Labels*" Tab.

STEP 1: In the "***Labels***" tab, you can create labels that are used to mark mail so that you can find them more easily later. To add a new label, select "***Add Label***".

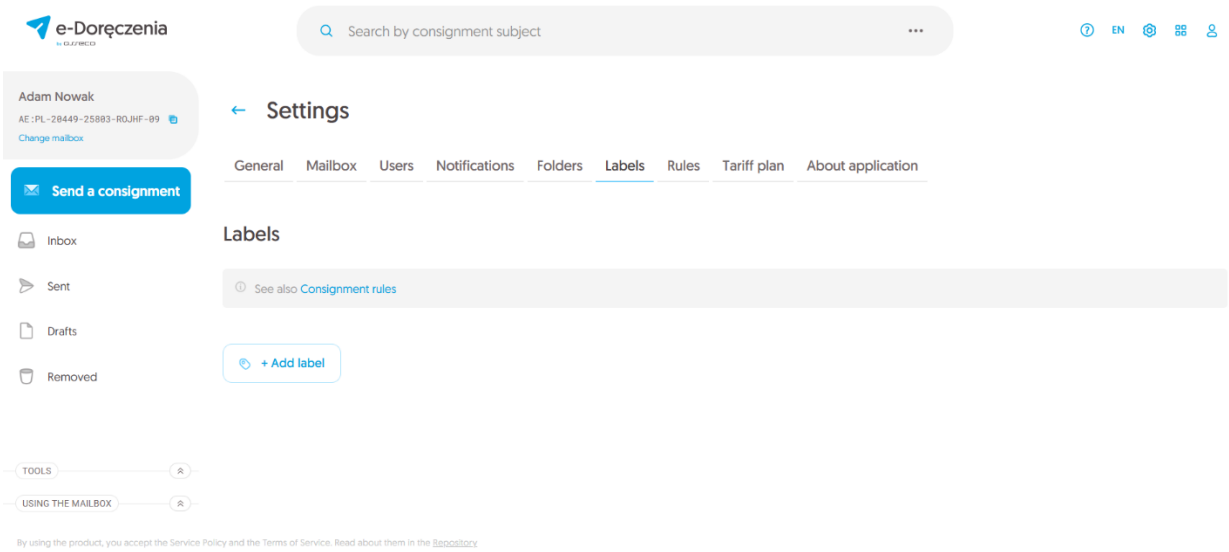

Figure 34: ***Settings - Label creation - step 1.***

STEP 2: In the next window, enter the name of the label to be created. You can also set its background color and text color.

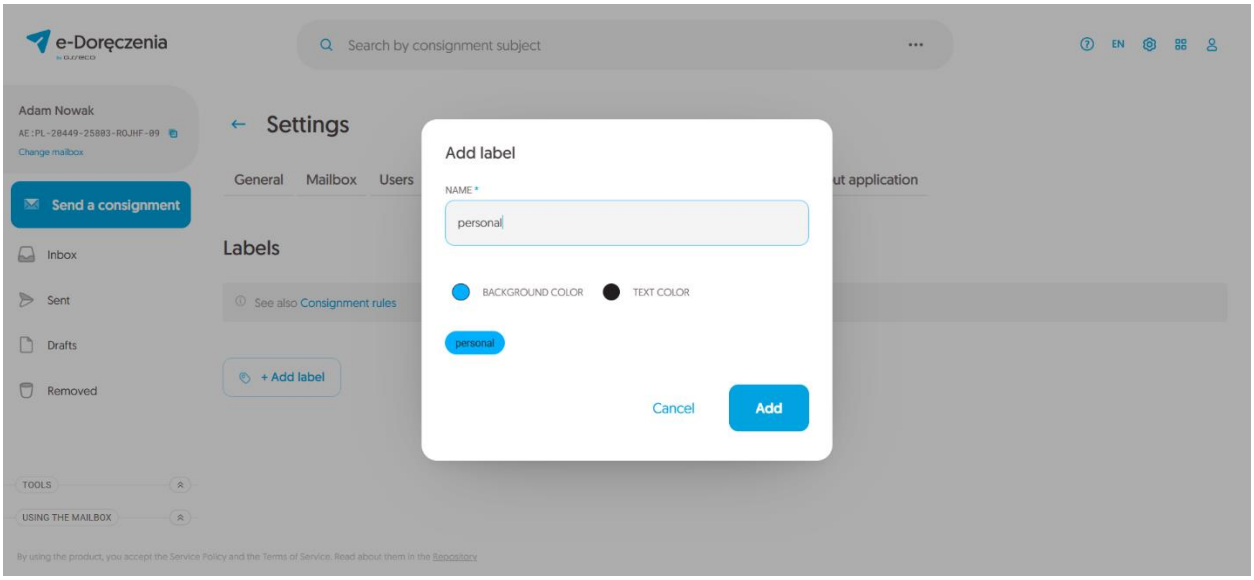

Figure 34.1: ***Settings - Label creation - step 2.***

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STEP 3: After entering the name of the label and defining the colors of the background and text, select the "***Add***" option. The added label will appear on the labels list.

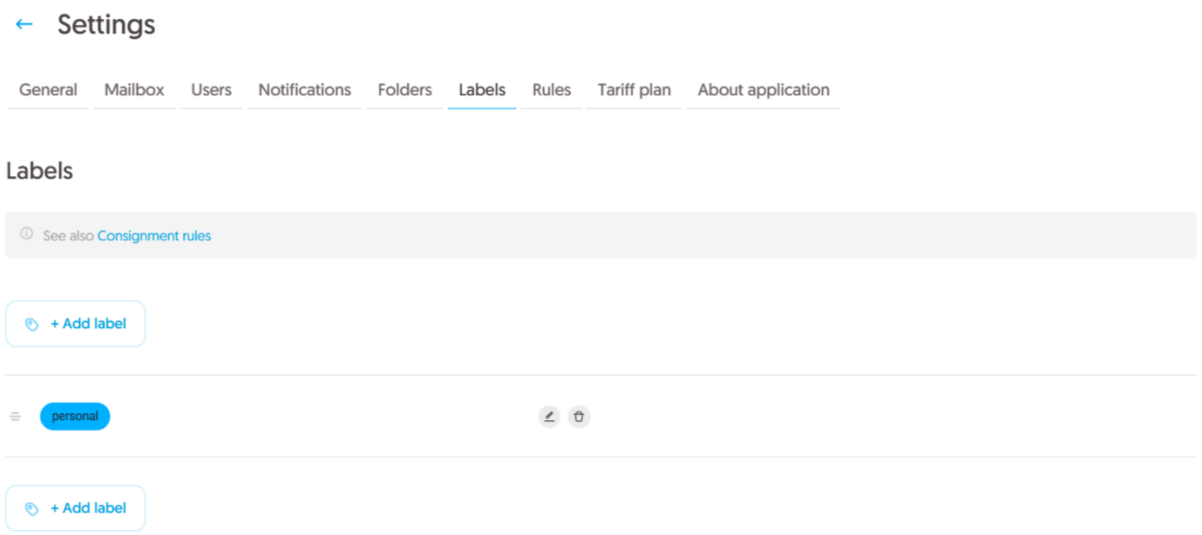

Figure 34.2: ***Settings - Label creation - step 3.***

6.7 "*Rules*" Tab.

STEP 1: In the "***Rules***" tab, you can see the active criteria based on which the mail will be sorted. To set active rules, you must first enter labels and/or folders. They are described in the sub-chapter above.

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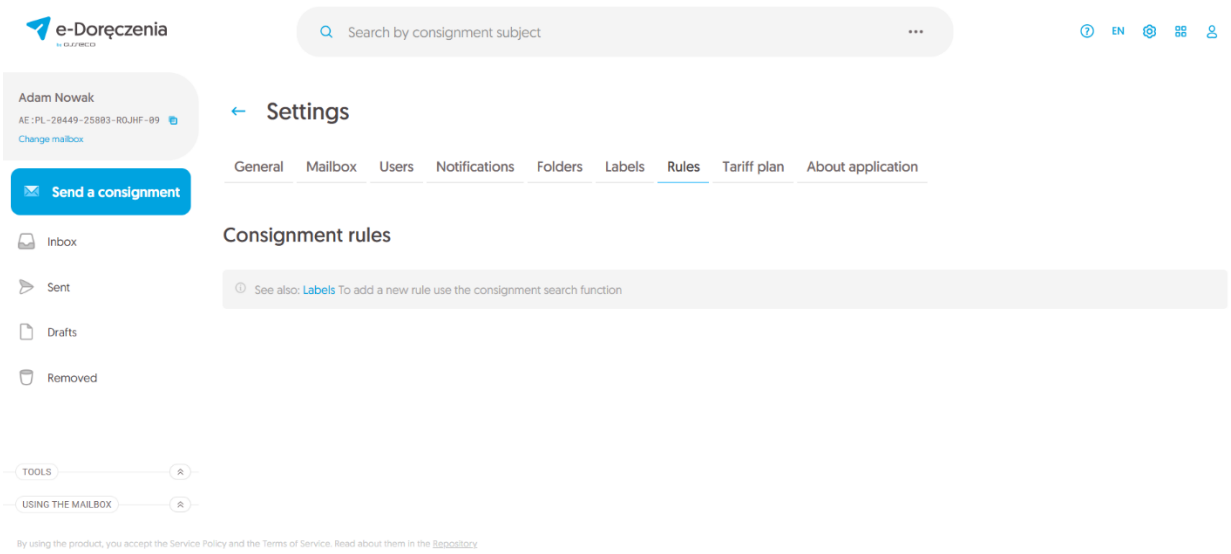

Figure 35: ***Settings - Rule creation - step 1.***

STEP 2: To set the appropriate rules for mail, click on the three dots in the search bar and additional options will expand. Select the "***Search consignment***" option.

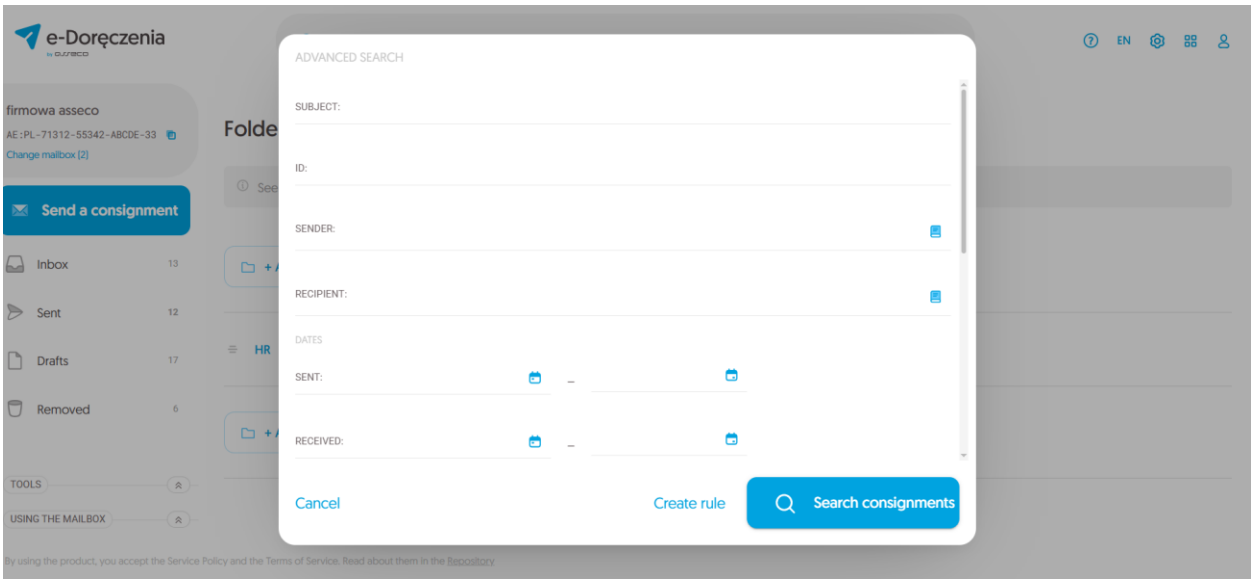

Figure 36.1: ***Settings - Rule creation - step 2.***

STEP 3: Then in the upper right corner you will see the option "***Create rule***". Select it to open the rule wizard.

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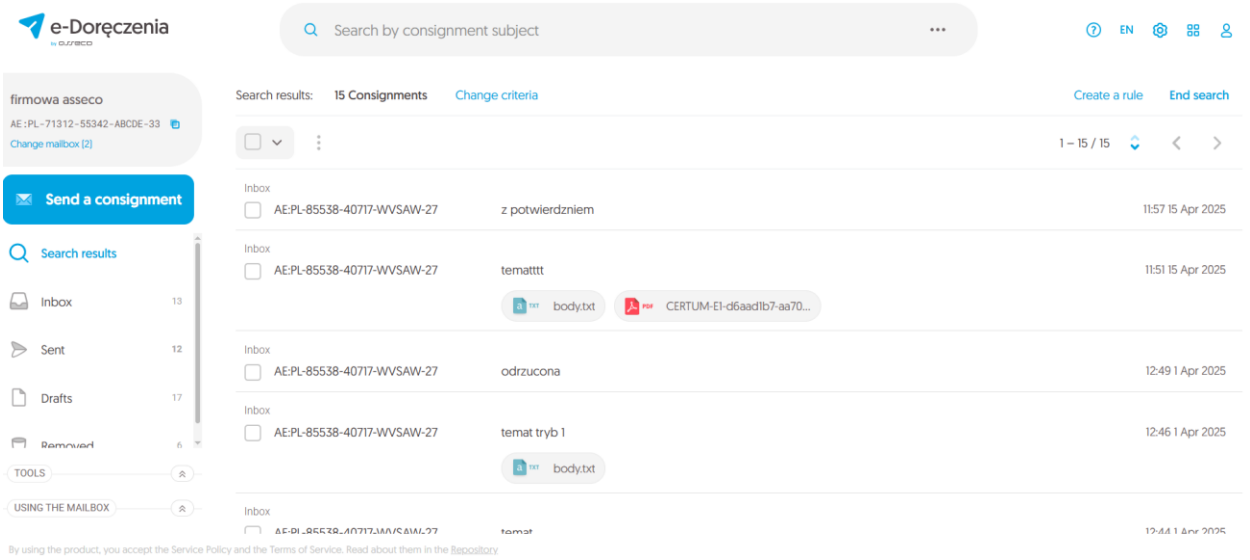

Figure 36.2: ***Settings - Create a rule - step 3.***

STEP 4: In the next step, you can select the bar "***Add label***" and choose a label from the expanded list. To expand the list, select the "*label's*" icon.

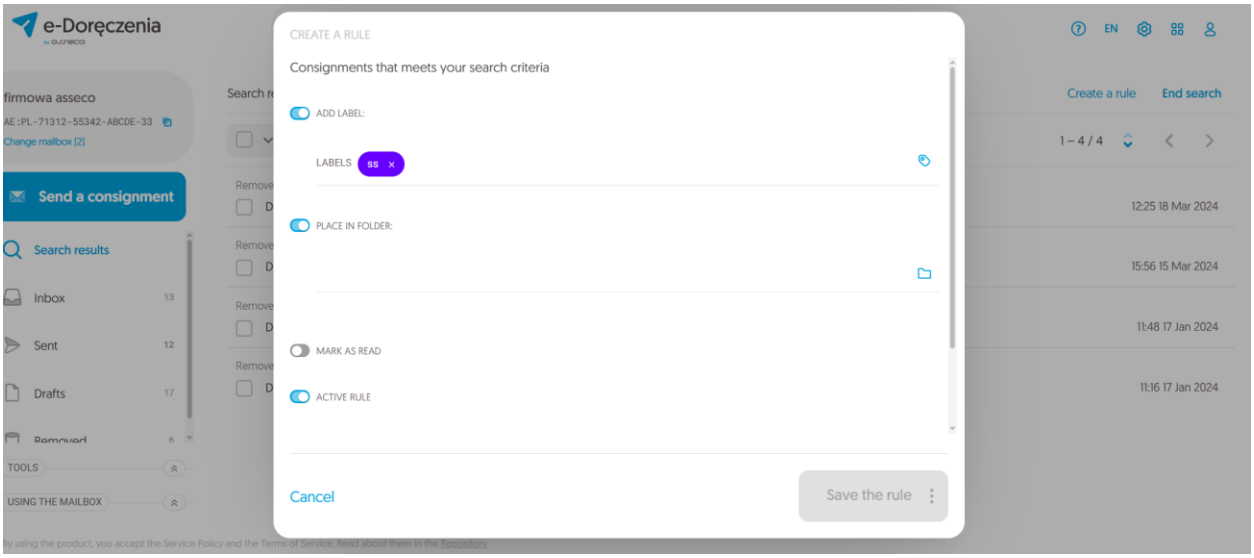

Figure 36.3: ***Settings - Rule creation - step 4.***

STEP 5: Then you can select the bar "***Place in folder***" and choose a folder from the expanded list. To expand the list, select the "***folder's***" icon.

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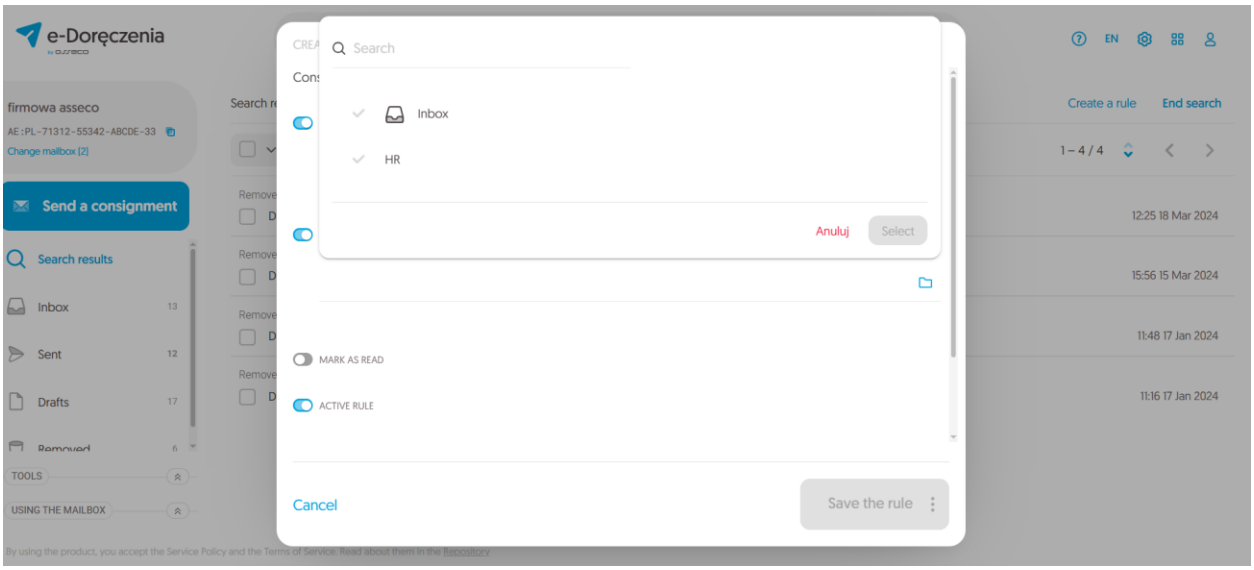

Figure 36.4: ***Settings - Rule creation - step 5.***

STEP 6: To make a rule active, select the bar "***Active rule***" and in the field "***Name the rule***" select a name for the rule. After completing these steps, select "***Save the rule***".

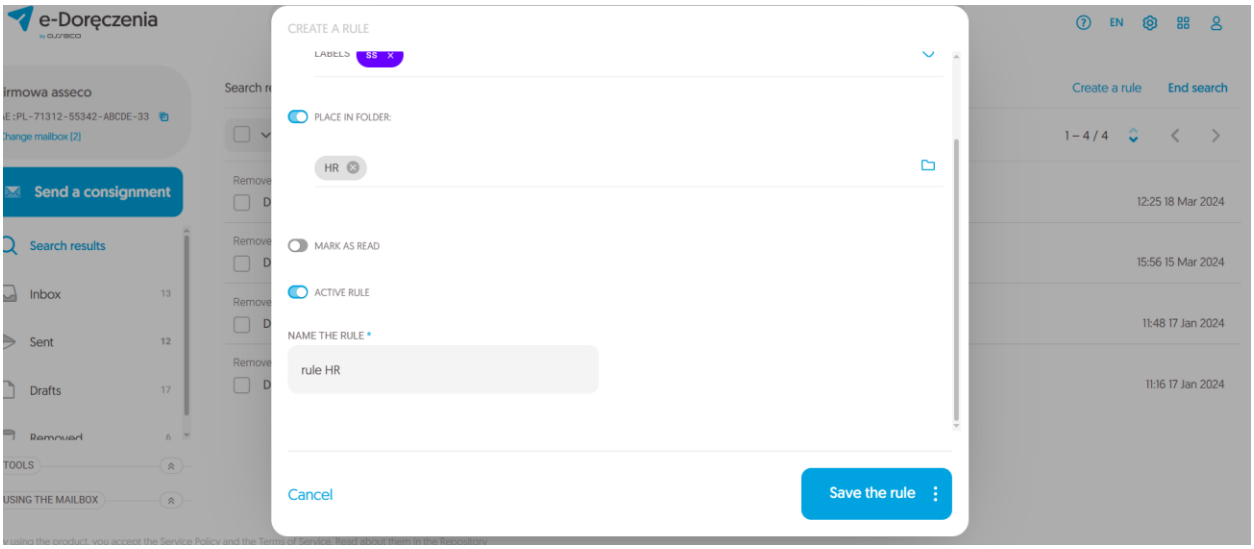

Figure 36.5: ***Settings - Rule creation - step 6a.***

In addition to being able to save the rule, there is also an option to run it immediately. Click the three vertical dots on the "Save the rule" button and select the "Save and run the rule (works backwards)" option. The rule will be saved and run.

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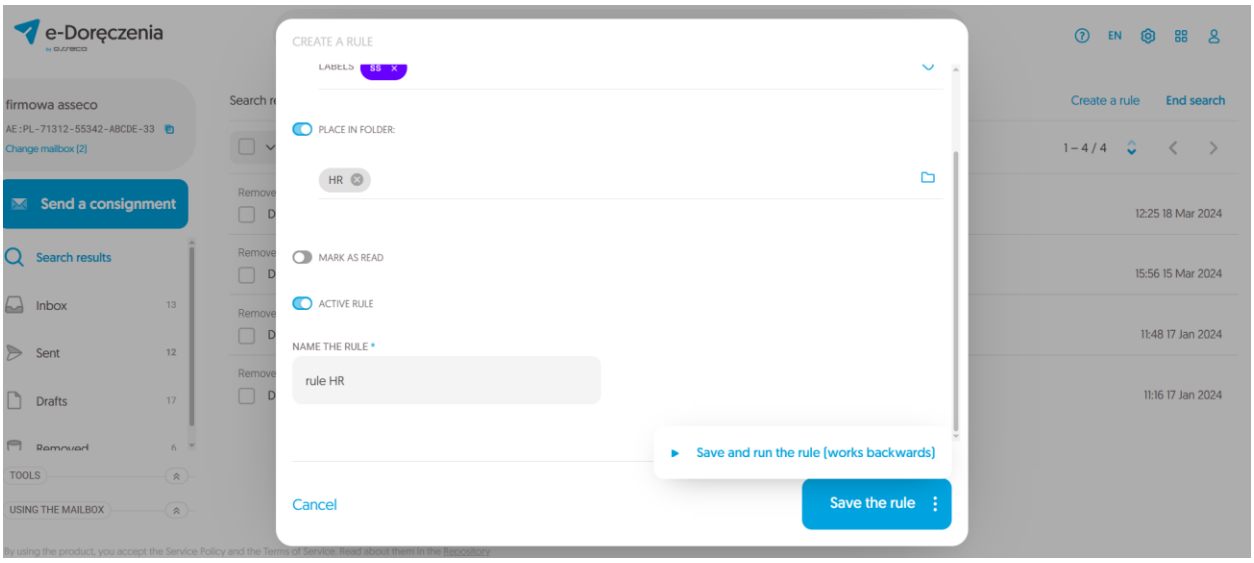

Figure 36.5: ***Settings - Rule creation - step 6b.***

ATTENTION!

A minimum of one of the following options must be selected for a rule to be saved and run:

- add label,
- place in folder,
- mark as read.

If the User now goes to "***Settings***" and the tab "***Rules***," the rule created in the previous step will be shown. Next to the rule name, you can find the rule management panel.

It includes options such as:

- "*Turn off rule*";
- "*Execute rule*";
- "*Settings*";
- "*Delete Rule*."

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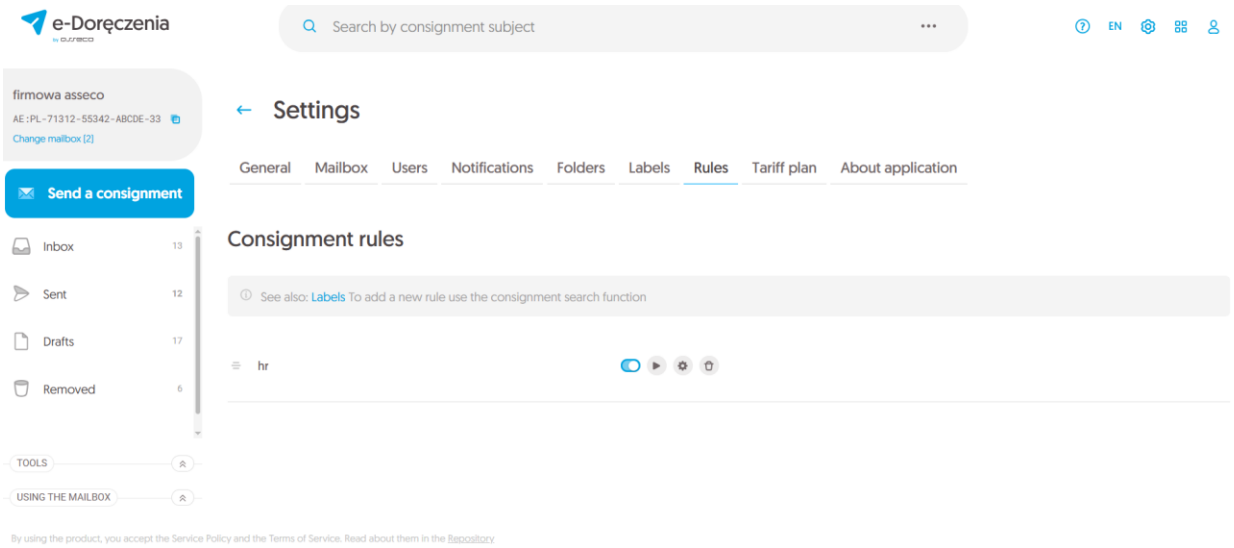

Figure 37: ***Settings - "Rules" Tab - "Consignment Rule" option*****.**

6.8 "*Tariff plan*" Tab.

This tab allows you to view information about the current tariff plan. Information such as the use of the available space limit and details of the selected plan are displayed. In addition, it is possible to go to the Certum store to change the selected tariff plan – the button "***Change plan***" is used for this. After selecting this option, you are taken to the Certum Store, where the User can continue the further process of purchasing the service.

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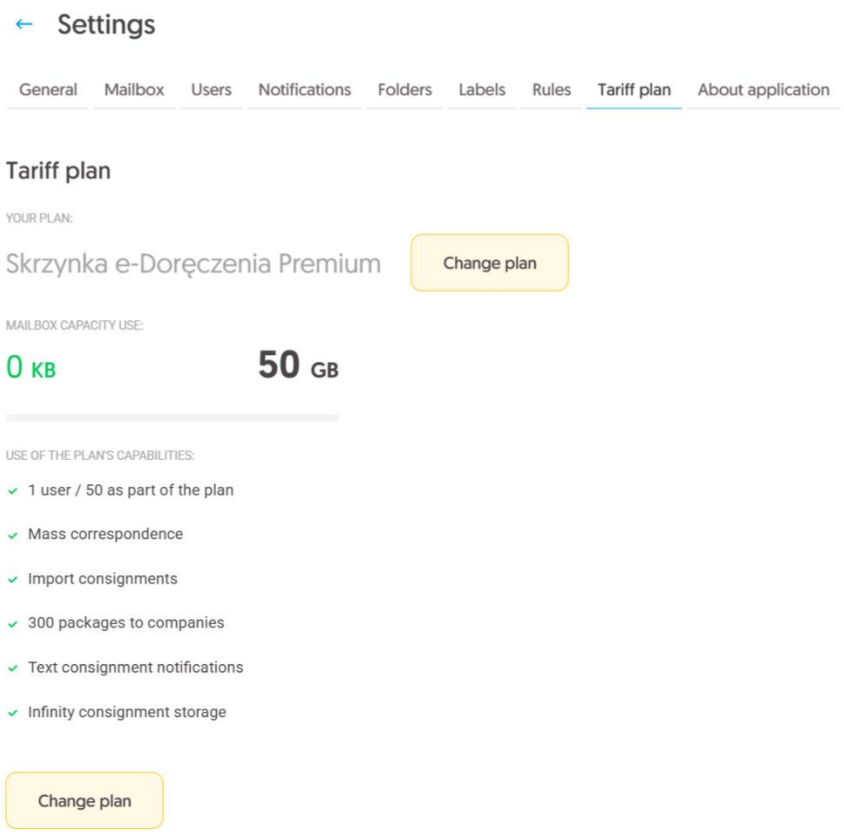

Figure 38: *Settings* - "*Tariff Plan*" Tab.

6.9 "*About application*" Tab.

Here you can find information on the current version of the application, as well as the regulations of the privacy policy and e-Delivery service.

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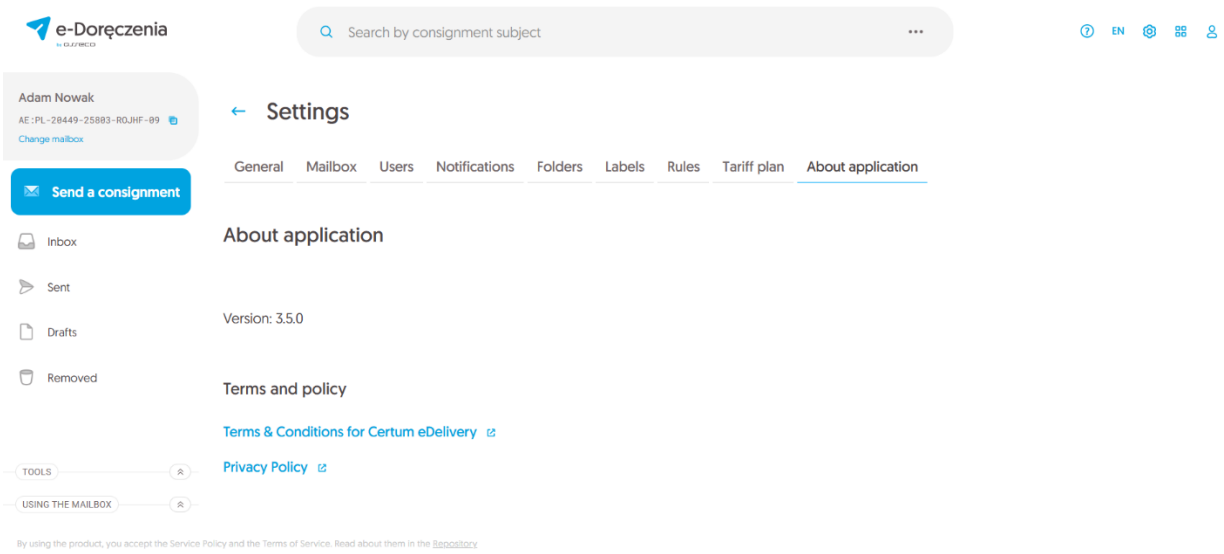

Figure 39: *Settings* - "*About application*" Tab.

7. "*Tools*" Bar.

The tools bar is located on the left side of the mailbox management panel.

It is a sliding bar that includes options such as:

- "*Contacts*",
- "*Mass consignment*".

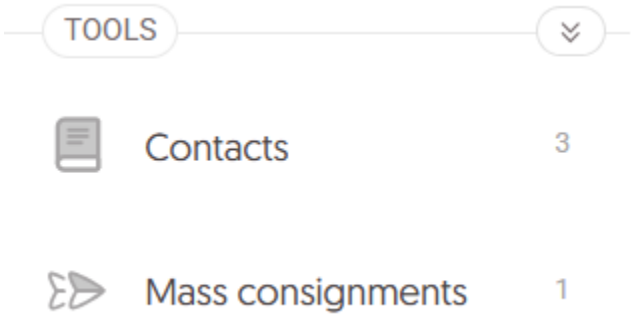

Figure 40: "*Tools*" *Bar.*

certum.pl
infolinia@certum.pl

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7.1 "*Contacts*"

The "***Contacts***" option allows managing the User's address book. It is possible to add, delete and modify contacts. With this option, a search of the contact list is also available.

The contacts are divided into categories:

- *"Public institution*";
- *"Institution or non-public company*";
- *"Individual*";

You can filter the contact list by contact type.

Figure 41: "*Contacts*."

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7.1.1 Adding a contact automatically

STEP 1: To add a new contact to the address book, select "***Add contact***." A window will appear where you should select the type of contact and enter its data.

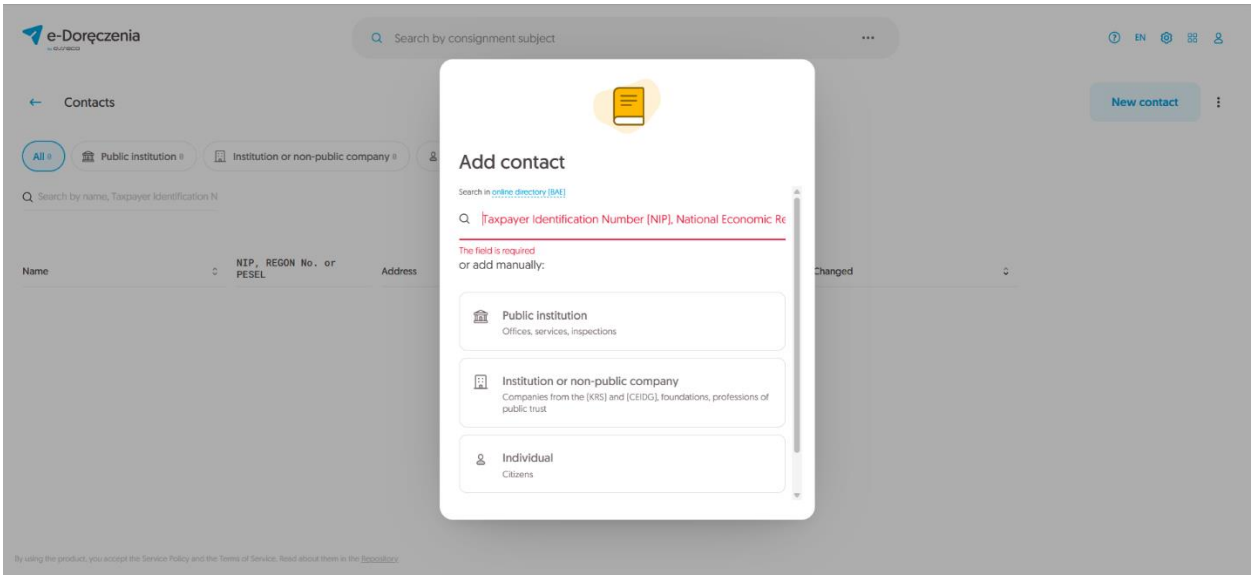

Figure 42: "*Adding a contact automatically - Step 1*."

STEP 2: If you add a contact from the "***Public institution***" or "***Institution or non-public company***" category, it is possible to automatically retrieve the data of this institution from the Database of Electronic Addresses (BAE) based on its registration number (REGON or NIP). In order to automatically retrieve the data of the added contact, enter its registration number and press the "***Search in online directory (BAE)*** " button. In the case of the graphic below, the ADE address by which the system searched for the right person was given. To have the searched address automatically added to your contact list, just click on it.

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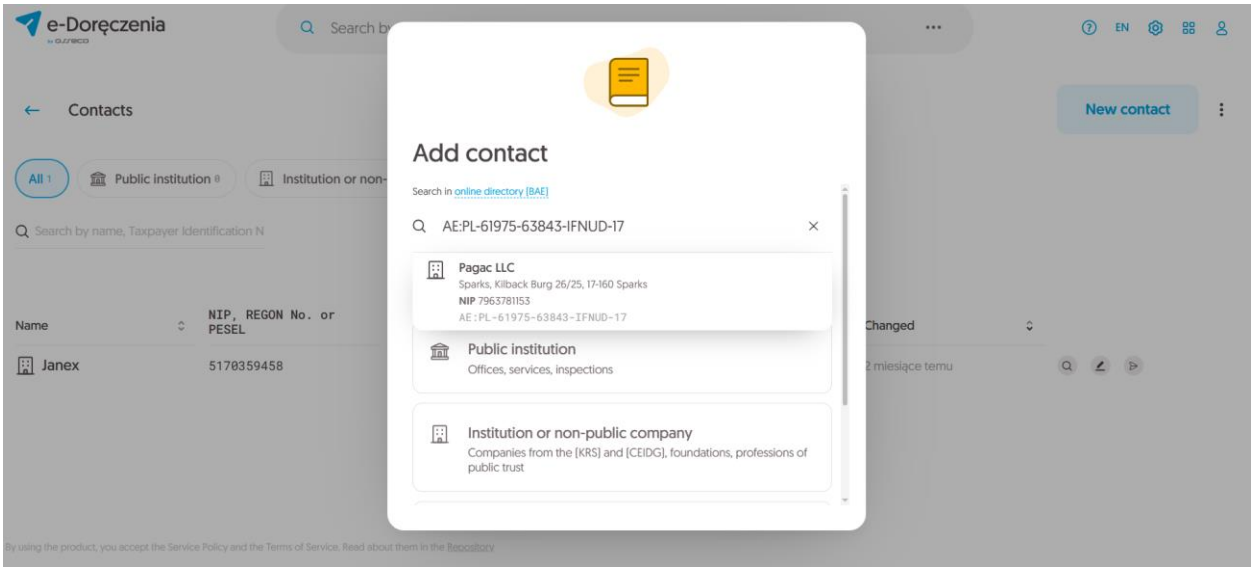

Figure 43.1: "*Adding a contact automatically - Step 2*."

STEP 3: If the action is successful, a message will appear in the upper right corner stating "***Contact added"***. The contact along with its retrieved data will be in the contact list.

Figure 43.2: "*Adding a contact automatically - Step 3*."

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7.1.2 Adding a new contact manually

To add a new contact to the address book, select ***"New contact"***. A window will appear where you should select the type of contact and enter its data.

If you select "***Individual***," you must provide the following data (asterisks indicate mandatory fields):

- "*Electronic Delivery Address (ADE)*"*****;
- "Contact name"*,
- "*National Identification Number (PESEL)*";
- "*First name*"*****;
- "*Last name*";
- "*Street*";
- "*House number*";
- "*Premises number*";
- "*Locality*";
- "*Postal code*";
- "*Post office*";
- "*Country*";
- "*Voivodeship*";
- "*E-mail address*";
- "*Description*".

Below you can see the process of manually adding ***Individuals*** to contacts:

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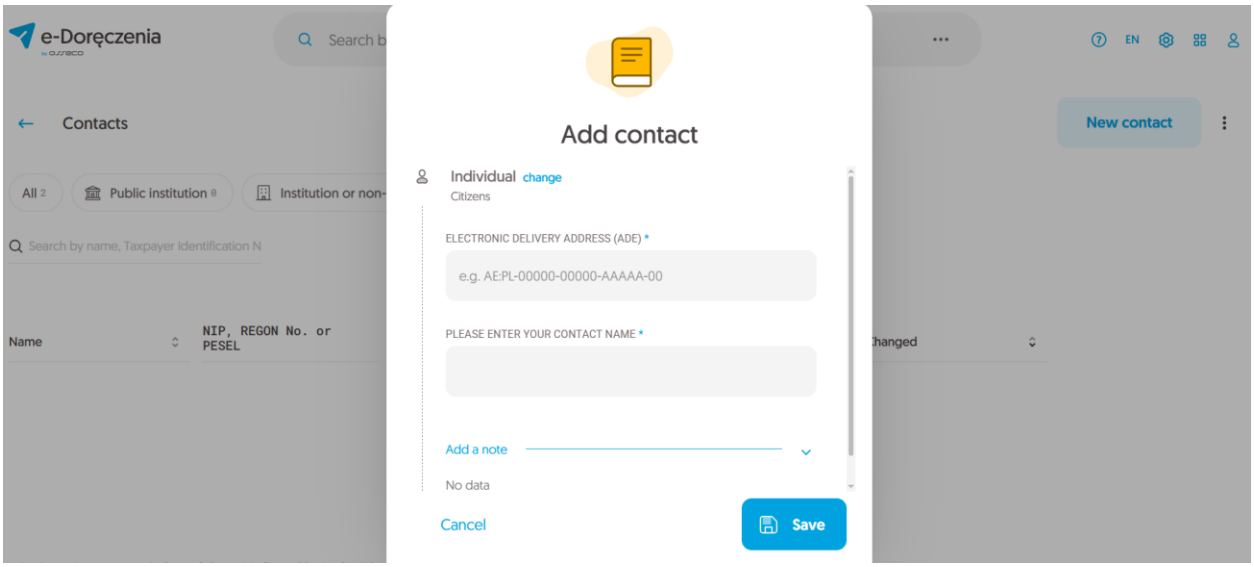

Figure 44: *Adding a new contact manually - "Individual*".

If you select an institution, you must provide the following data (asterisks indicate mandatory fields):

- "*Electronic Delivery Address (ADE)*"*;
- "*Taxpayer Identification Number (NIP)*";
- "Name"*;
- "*Street*";
- "*House number*";
- "*Premises number*";
- "*Locality*";
- "*Postal code*";
- "*Post office*";
- "*Country*";
- "*Voivodeship*";
- "*E-mail address*";
- "*Description*".

Below you can see the process of manually adding a "***Public institution***" to contacts:

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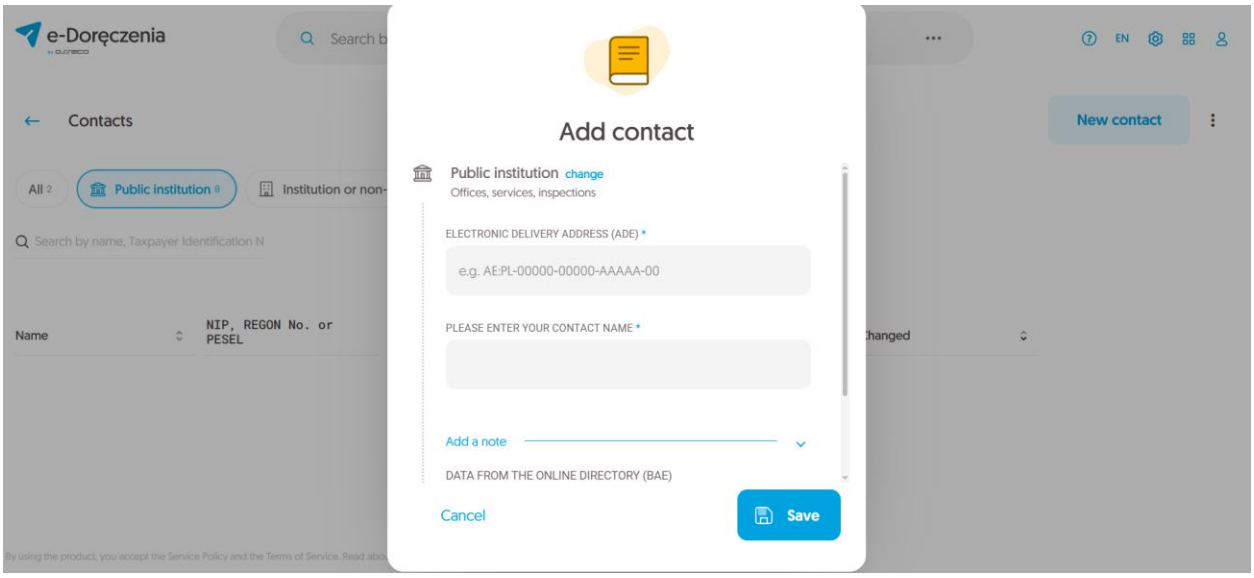

Figure 45: ***Adding a new contact manually - "Public institution."***

If you select a non-public institution, you must provide the following data (asterisks indicate mandatory fields):

- "*Electronic Delivery Address (ADE)*"*;
- "*Taxpayer Identification Number (NIP)*";
- "*Name*"*;
- "*Street*";
- "*House number*";
- "*Premises number*";
- "*Locality*";
- "*Postal code*";
- "*Post office*";
- "*Country*";
- "*Voivodeship*";
- "*E-mail address*";
- "*Description*".

Below you can see the process of manually adding a "***Institution or non-public company***" to contacts:

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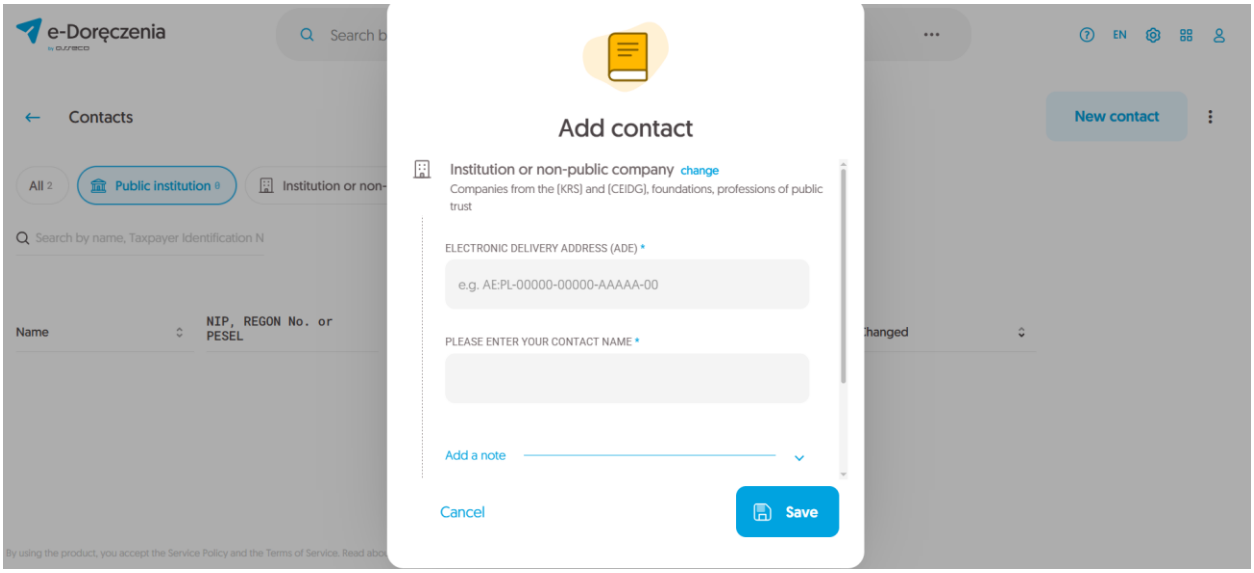

Figure 46: "*Adding a new contact manually – Non-public institution or company*."

7.2 "*Mass consignment*"

This folder contains mail sent to more than one recipient.

Selecting a mass consignment takes you to the list of consignment sent within that mass consignment. The review and handling of individual consignment is the same as for a regular consignment sent. We treat each single consignment as a regular consignment. Mass consignment can be sent in three modes. Deleting one consignment sent as part of mass consignment does not delete the entire mass consignment – only the deleted item is affected.

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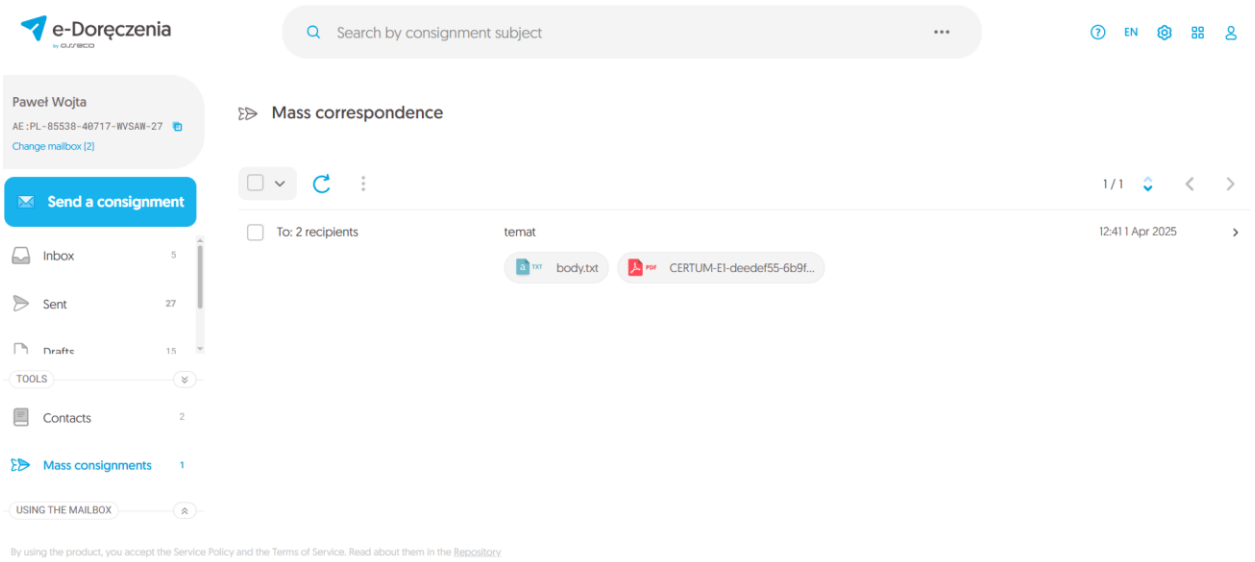

Figure 47*: Tools - "Mass consignment"*

8. Actions for handling consignment

8.1 Action I: *Receipt of consignment*

STEP 1: To receive consignment, go to the "***Inbox***" folder and sort consignment accordingly. In this case, select the filter "***All***" above the list of consignment. New consignment should be downloaded automatically. In addition, you can manually download new consignment with the button "***Synchronize***" symbolized by an arrow. The time of receipt is also recorded for each consignment. It is located to the right of the consignment line.

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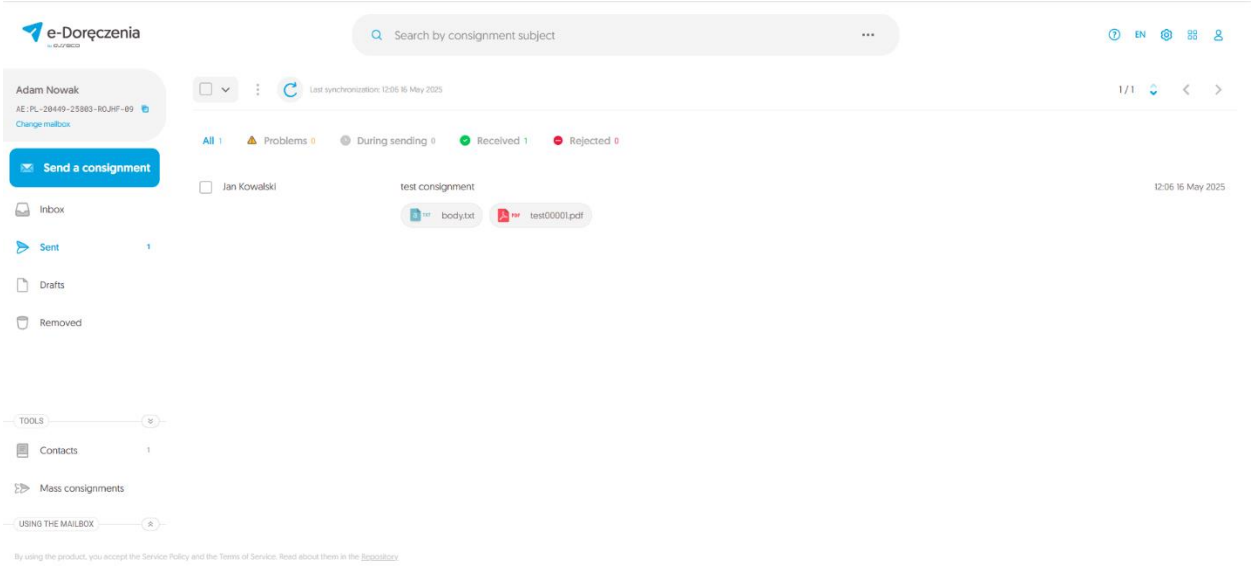

Figure 48: ***Receipt of consignment – step 1*****.**

STEP 2: Unread consignment is displayed in bold. To filter the view so that only consignment not yet received are shown, select the "***Unread***" filter above the list of consignment. Below you can see a consignment that has not yet been received:

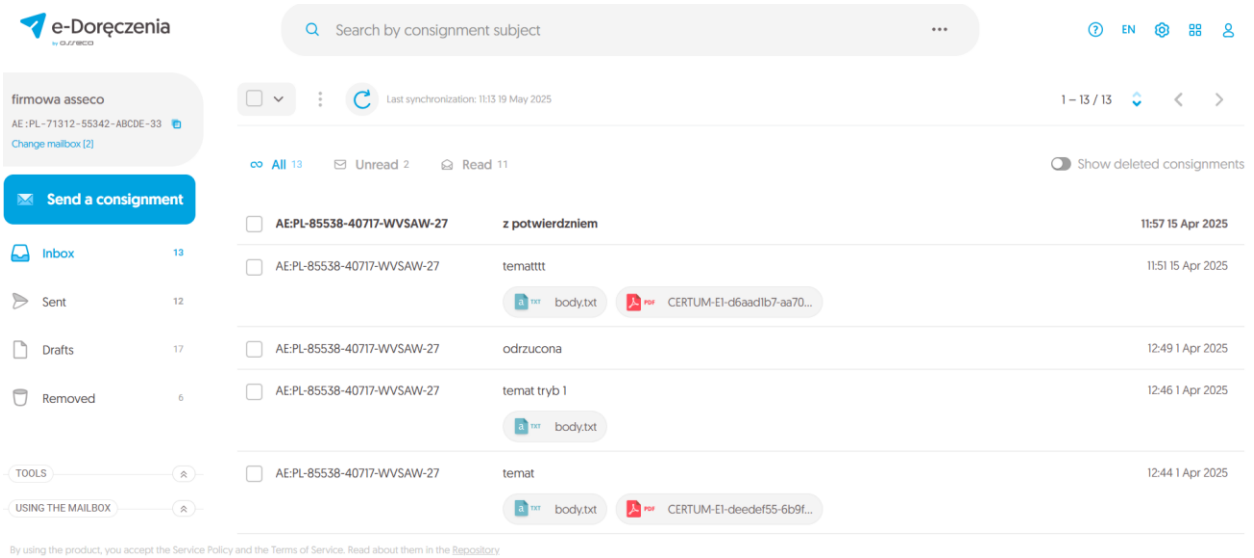

Figure 49.1: ***Receipt of consignment – step 2*****.**

STEP 3: To receive the consignment, you need to enter it. After this action, the consignment is no longer available in the "***Unread***" filter and goes to the "***Read***" mail.

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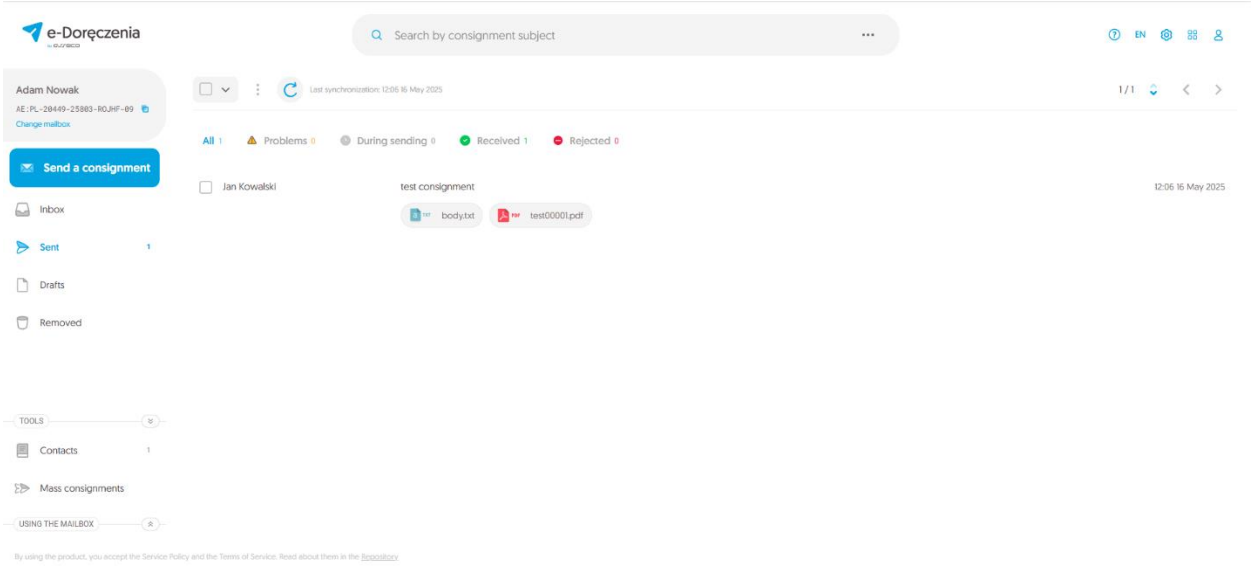

Figure 49.2: *Receipt of consignment – step 3*.

To filter the view so that only consignment received so far are shown, select the "***Read***" filter above the list of mail. Here you can find mail with the title "***Unread consignment***," which in the earlier steps of the instructions was received.

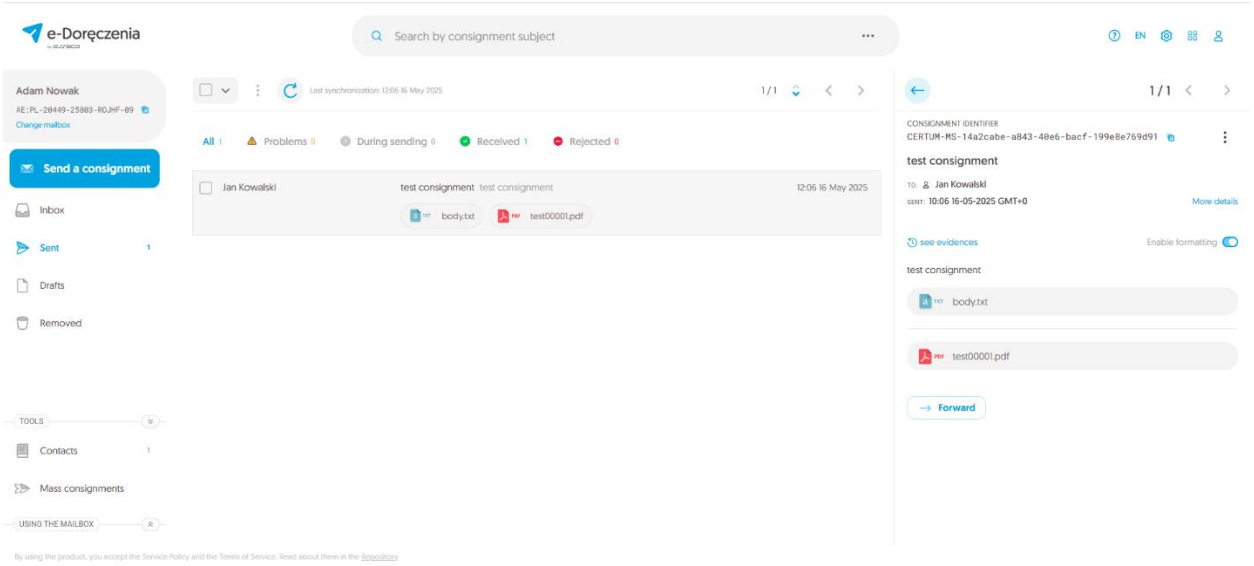

Figure 50: *"Read"* Filter.

In addition, in the upper right corner of the list of mail there is a "***Show deleted consignment***" switch. It also allows you to view consignment that were previously deleted.

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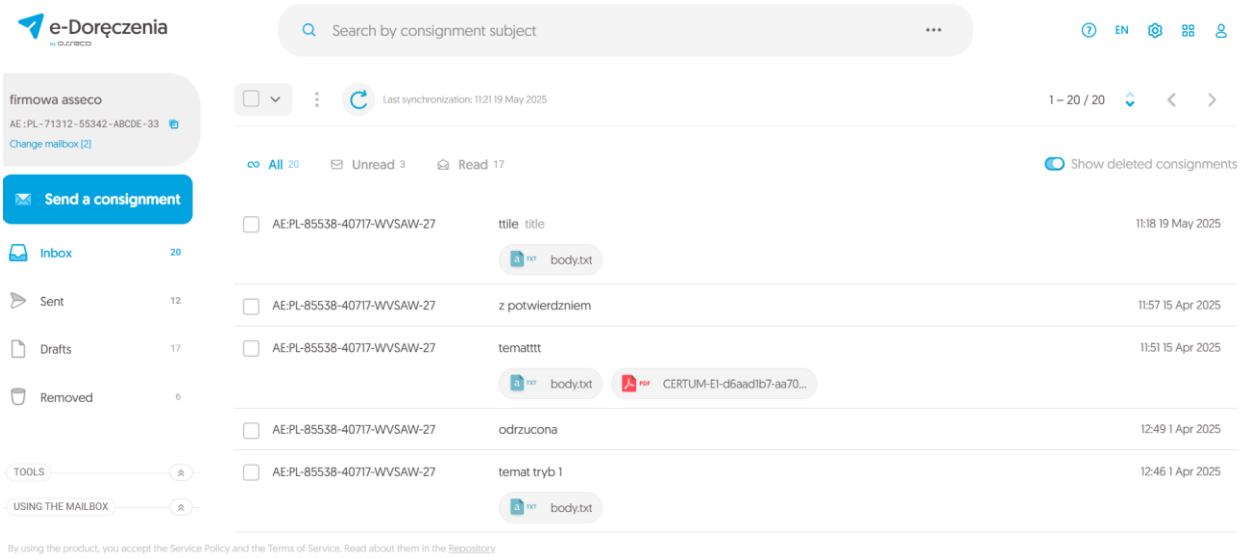

Figure 51: *"Show deleted consignments"* switch.

Modes of received consignment

Received consignment is divided into the following modes (types):

- *"Registered"*;
- *"Registered with confirmation"*;
- *"Registered with e – signature"*.

Depending on the type of consignment, the handling during collection varies. In the following sub-chapters, this issue is described in more detail.

NOTE:

Consignment with confirmation of receipt is not available to public recipients and senders.

8.1.1 Receiving consignment - "*Registered*" mode

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This is the simplest type of consignment. Receipt of such consignment consists only of entering it in the consignment list. Its content will be downloaded automatically from the server. This process is described in the ***"Send a consignment" Action*** sub-chapter of this manual. Below you can see the consignment being decrypted during the receiving process:

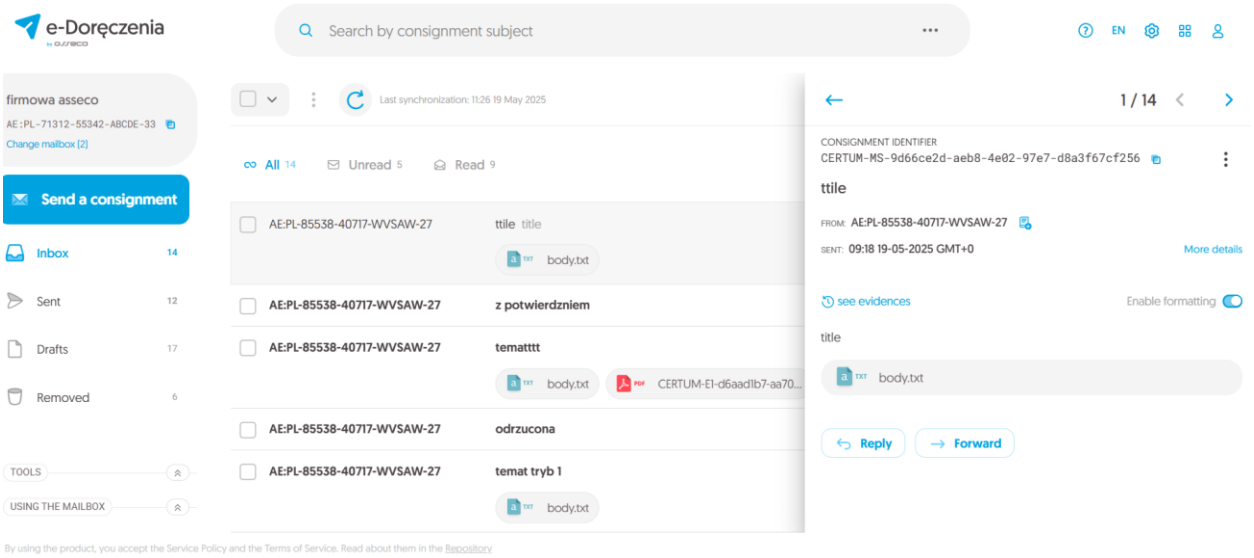

Figure 52: *Receipt of „Registered" consignment*.

8.1.2 Receiving consignment - "*Registered with confirmation*" mode

---

STEP 1: This is a type of consignment in which the recipient must confirm receipt. When you enter the selected consignment in the consignment list, you will be prompted to confirm receipt of the selected consignment. To do so, select "***Open consignment***".

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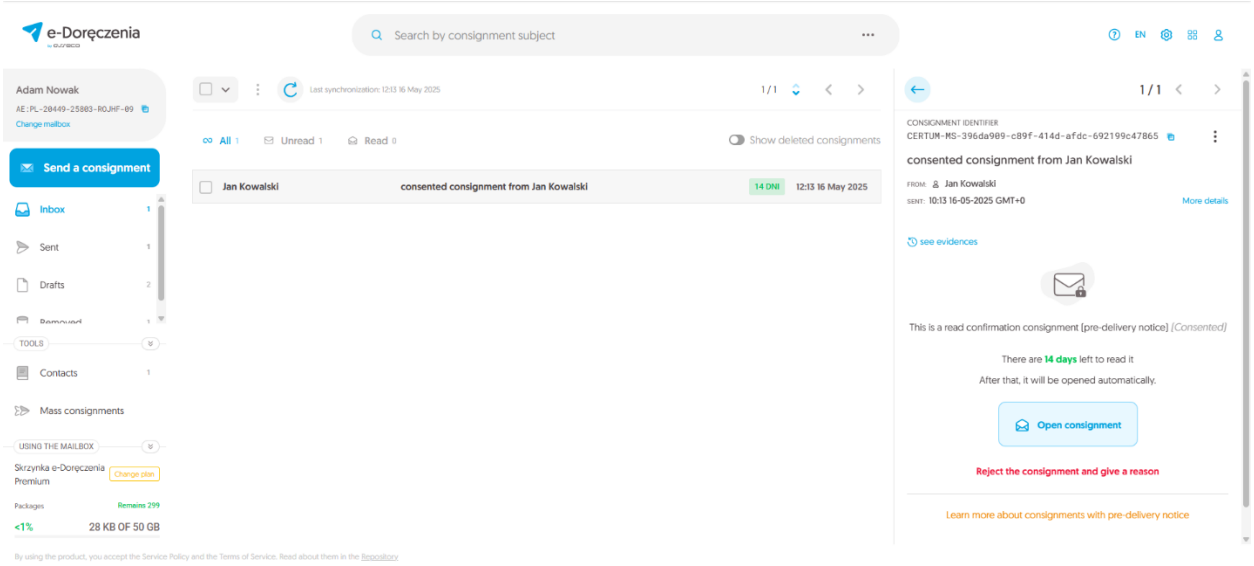

Figure 53: ***Receipt of "Registered with confirmation" consignment - step 1.***

STEP 2: After confirmation of receipt, the contents of the consignment will be downloaded from the server. The consignment can also be rejected – this option is described in more detail in the sub-chapter on rejecting consignment.

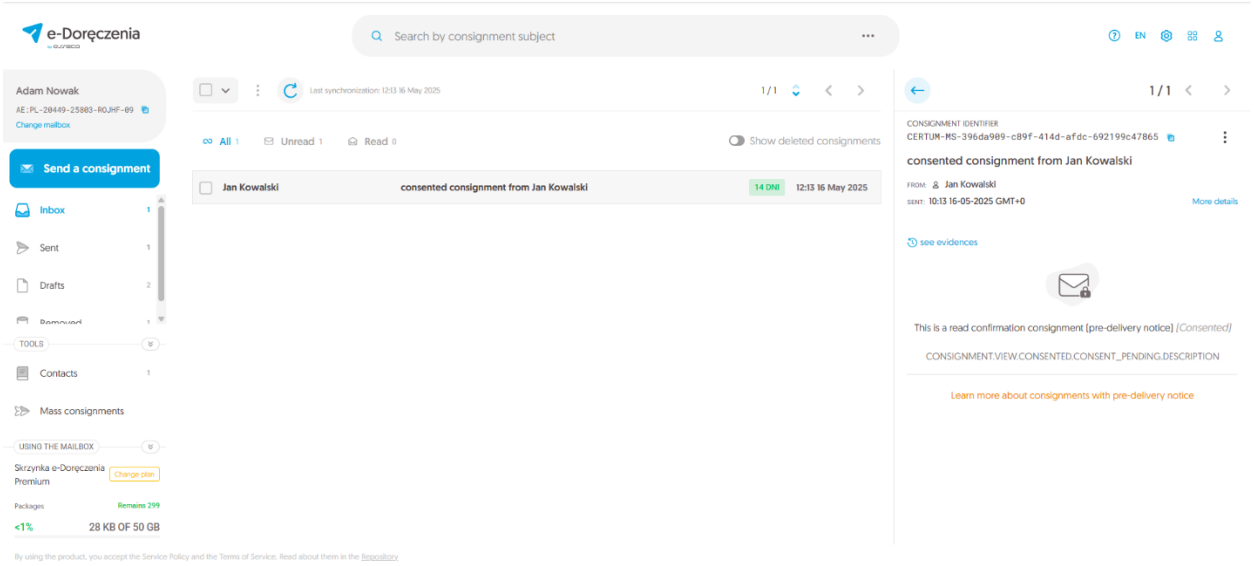

Figure 54.1: ***Receipt of "Registered with confirmation" consignment - step 2.***

8.1.3 Rejecting consignment - "*Registered with confirmation*" mode.

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STEP 1: If the User wants to reject the mail, then they must select the option "***Reject the consignment and give a reason***".

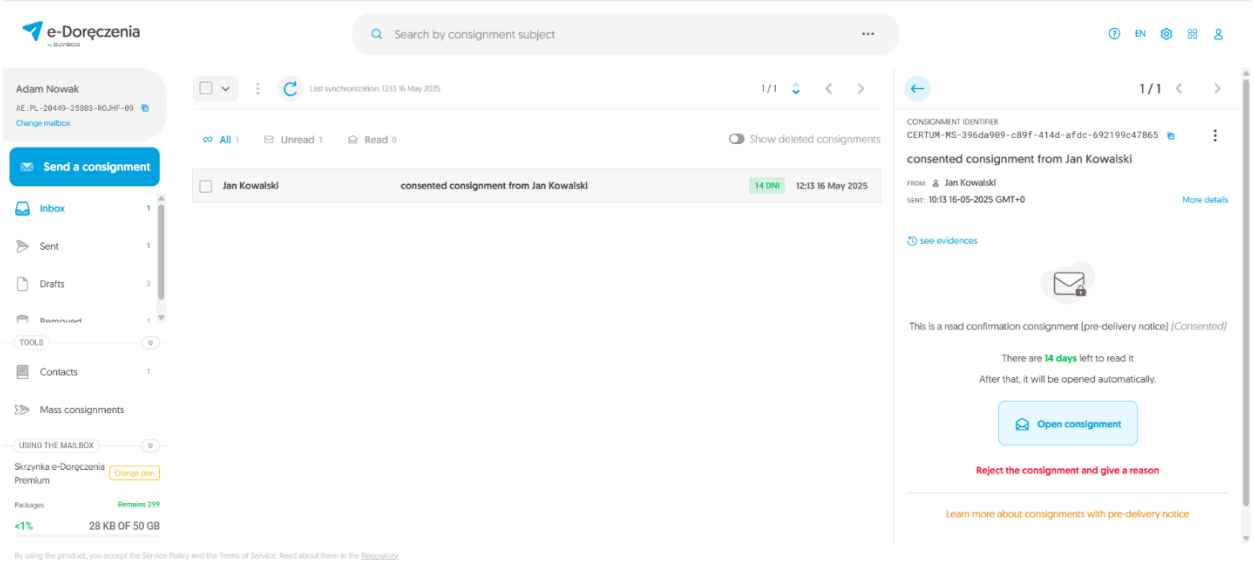

Figure 55: ***Rejection of "Registered with confirmation" consignment - step 1.***

STEP 2: After selecting the reason for rejection, confirm it with the option "***Save***".

Reasons for possible rejection of the mail receipt, in this case, are:

- "*I refuse to accept this consignment*";
- "*The consignment address is incorrect*";
- "*Incorrect consignment address* ".

After selecting the reason for the rejection, the system will perform the rejection and generate the corresponding proof.

The consignment can also be received – this option is described in more detail in the sub-chapter on consignment reception.

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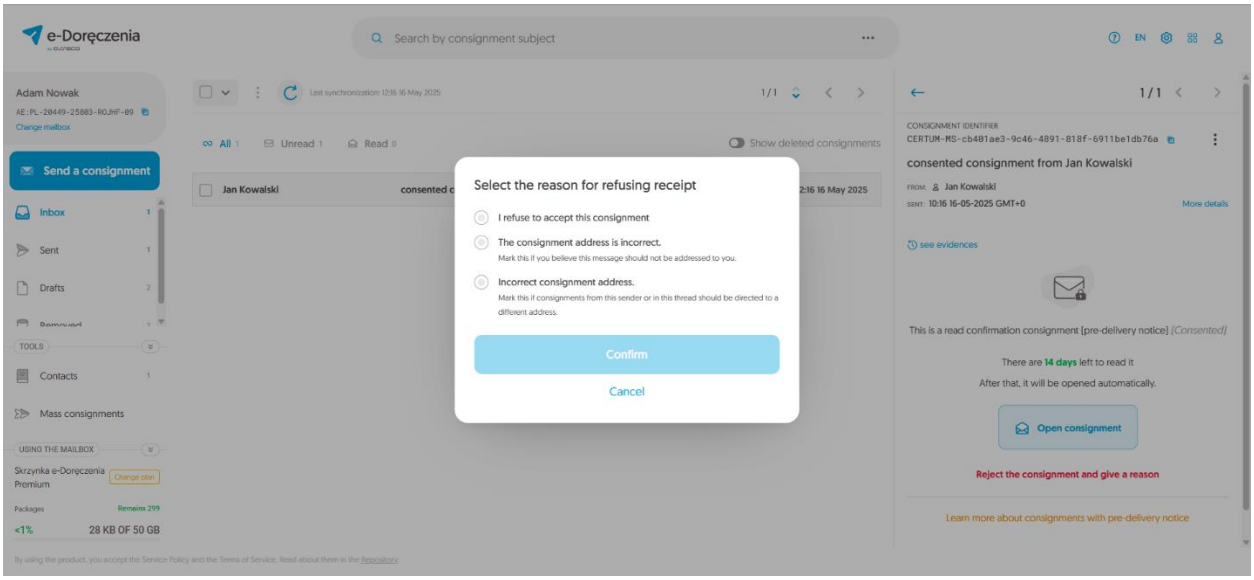

Figure 56.1: ***Rejection of "Registered with confirmation" consignment - step 2.***

STEP 3: The rejected consignment will contain information about the fact that it is rejected consignment, the date of the rejection action and the reason for rejection selected by the user will also be recorded.

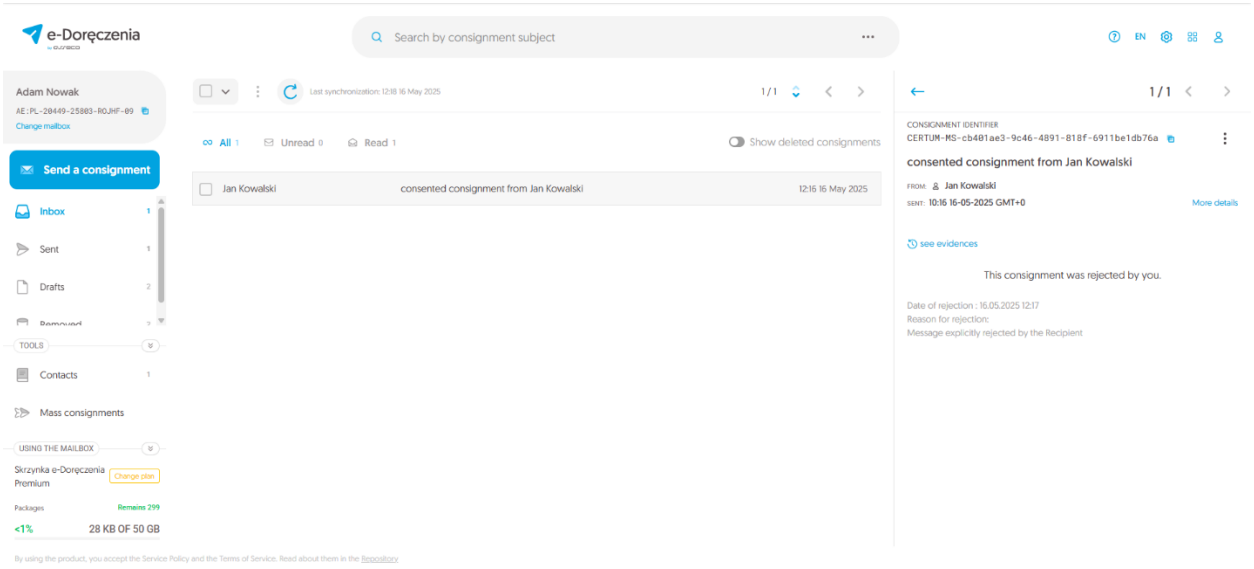

Figure 56.2: ***Rejection of "Registered with confirmation" consignment - step 3.***

8.1.4 Receiving consignment - "*Registered with e-signature*" mode

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STEP 1: This is a type of consignment in which the recipient must confirm receipt using an electronic signature. When you enter such consignment in the list of mail, you will be prompted to confirm receipt of this consignment. This should be done by selecting "***Open consignment***."

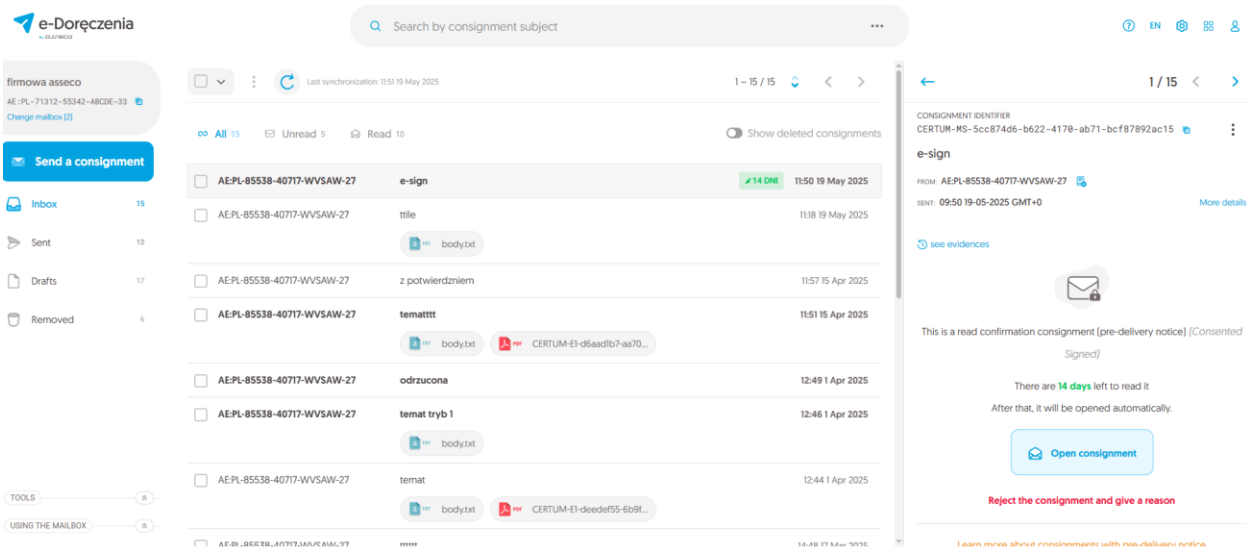

Figure 57: ***Acceptance of "Registered with e - signature" consignment - step 1.***

STEP 2: After selecting the option to open the consignment, you are redirected to the next window. Once the confirmation of receipt process begins, the electronic signature process will begin. Once the electronic signature is performed, the contents of the mail will be downloaded from the server.

The consignment can also be rejected – in this case, this decision must also be confirmed with an electronic signature. This option is described in more detail in the subsection on rejecting consignment.

After clicking the "***Open consignment***" button, a window will appear that allows you to select the medium on which the User's qualified certificate is contained.

Currently, it is possible to select signature media, such as:

- *"SimplySign"*;
- *"Local signature"*;
- *"I do not have a signature".*

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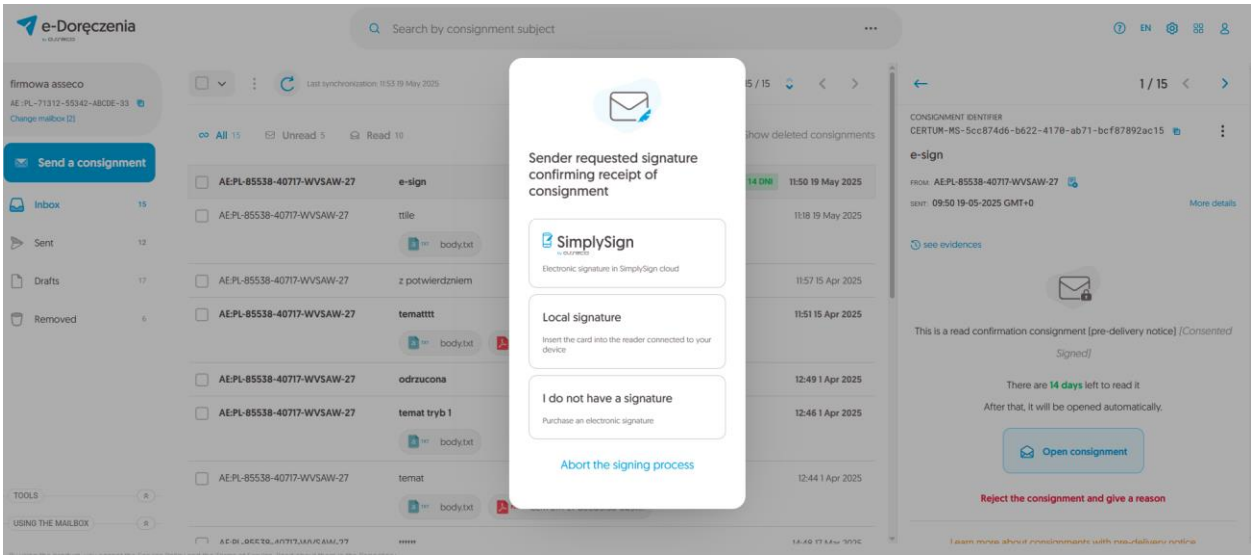

Figure 58.1: ***Acceptance of "Registered with e - signature" consignment - step 2.***

STEP 3: Depending on the choice of signature medium, the User will be redirected to the appropriate process for signing documents.

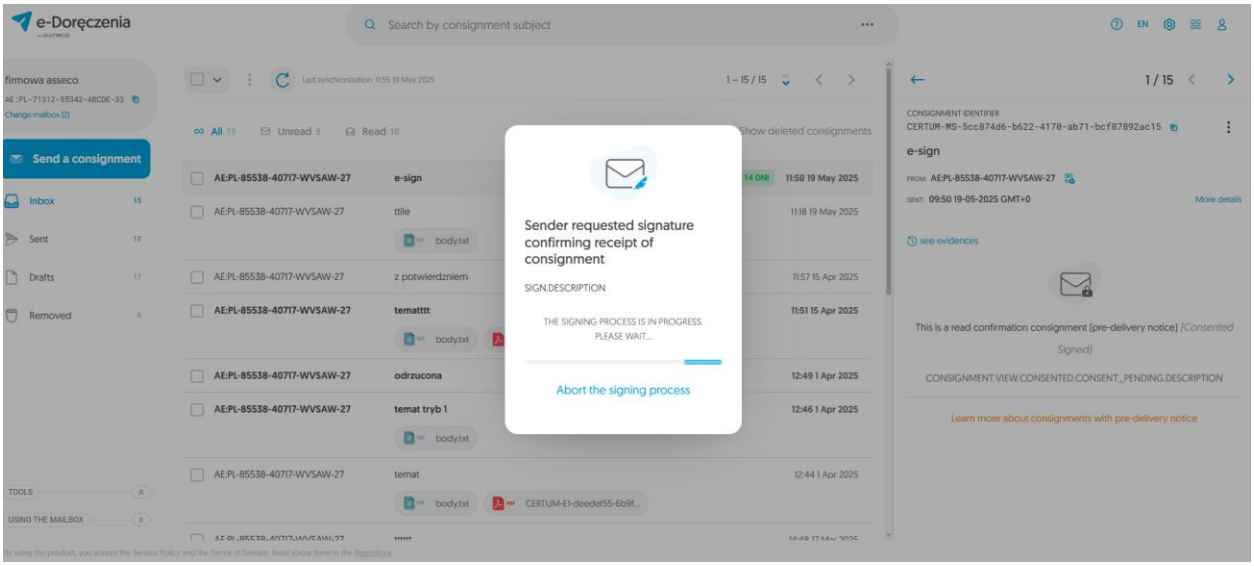

Figure 58.2: ***Acceptance of "Registered with e - signature" consignment - step 3.***

STEP 4: After selecting it, a page will appear with a statement that the User will have to sign. To start the signing process, select the "***Sign***" option in the upper right corner of the page.

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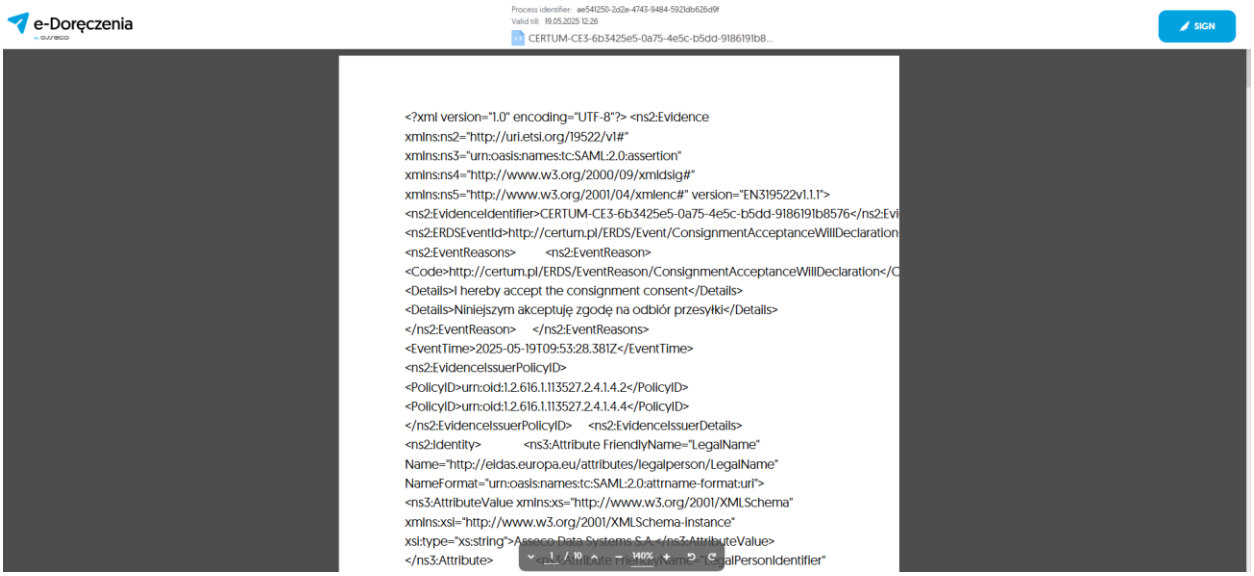

Figure 58.3: ***Acceptance of "Registered with e - signature" consignment - step 4.***

STEP 5: To sign the document it is necessary to log in to your SimplySign account.

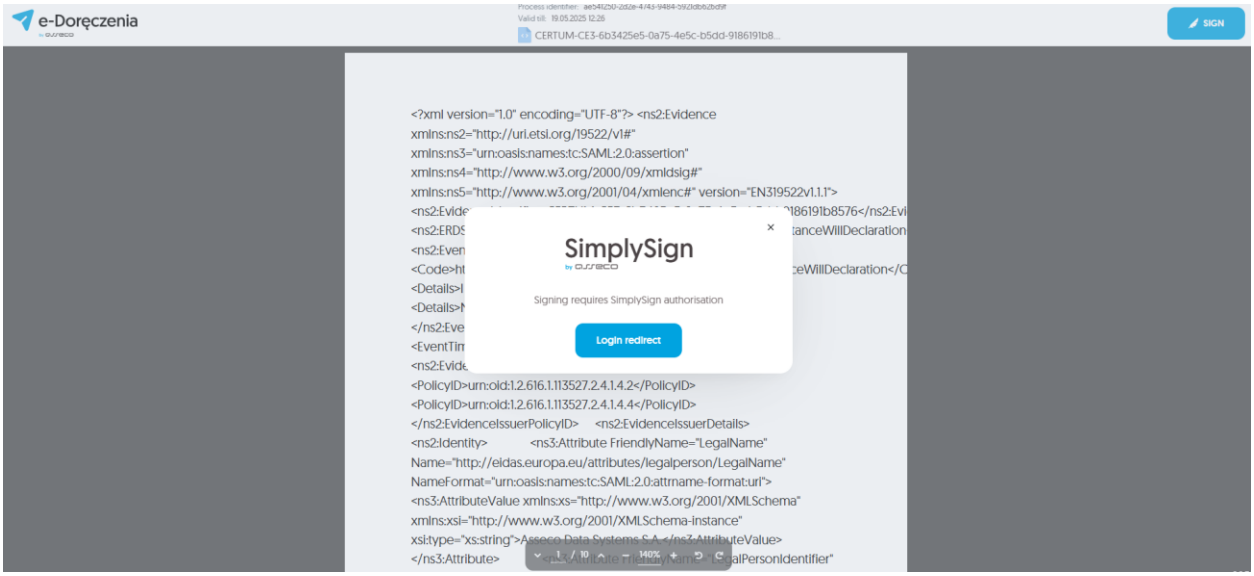

Figure 58.4: ***Acceptance of "Registered with e - signature" consignment - step 5.***

STEP 6: To log in to the SimplySign signing service, you will need to enter your application login credentials. It is necessary to enter the e-mail address and token from SimplySign application.

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Figure 58.5: ***Acceptance of "Registered with e - signature" consignment - step 6.***

STEP 7: After logging into SimplySign, it will be possible to select the User's certificate.

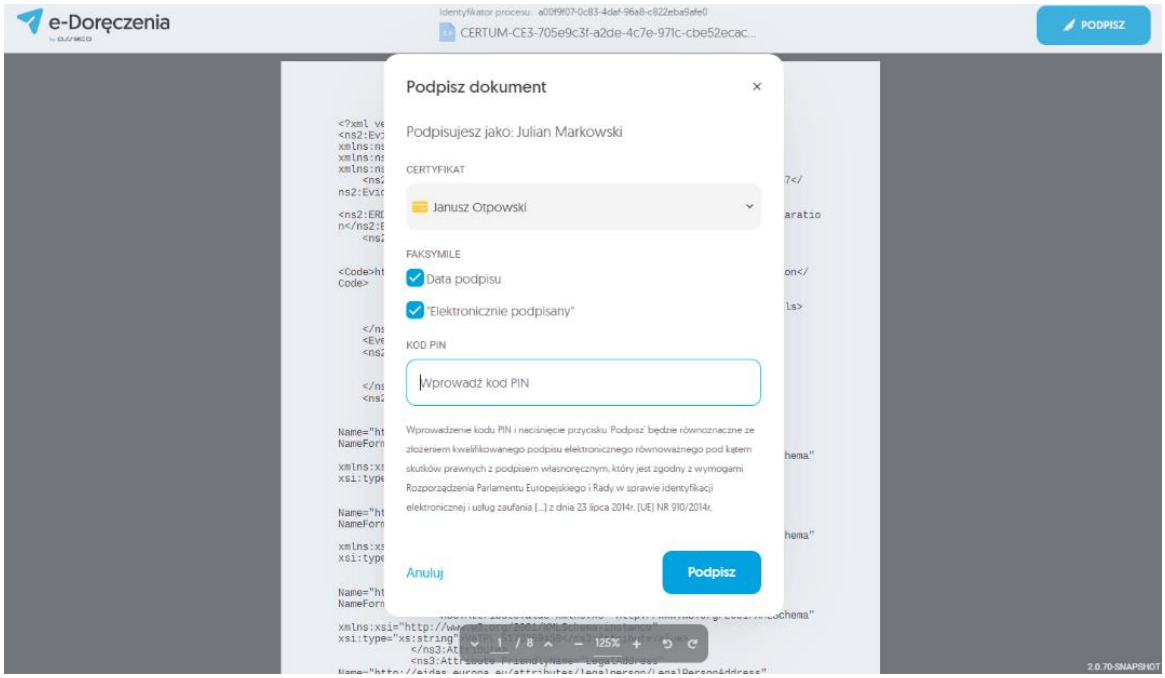

Figure 58.6: ***Acceptance of "Registered with e - signature" consignment - step 7.***

STEP 8: After selecting the User's certificate, entering a valid PIN and selecting the "***Sign***" option, the declaration will be signed.

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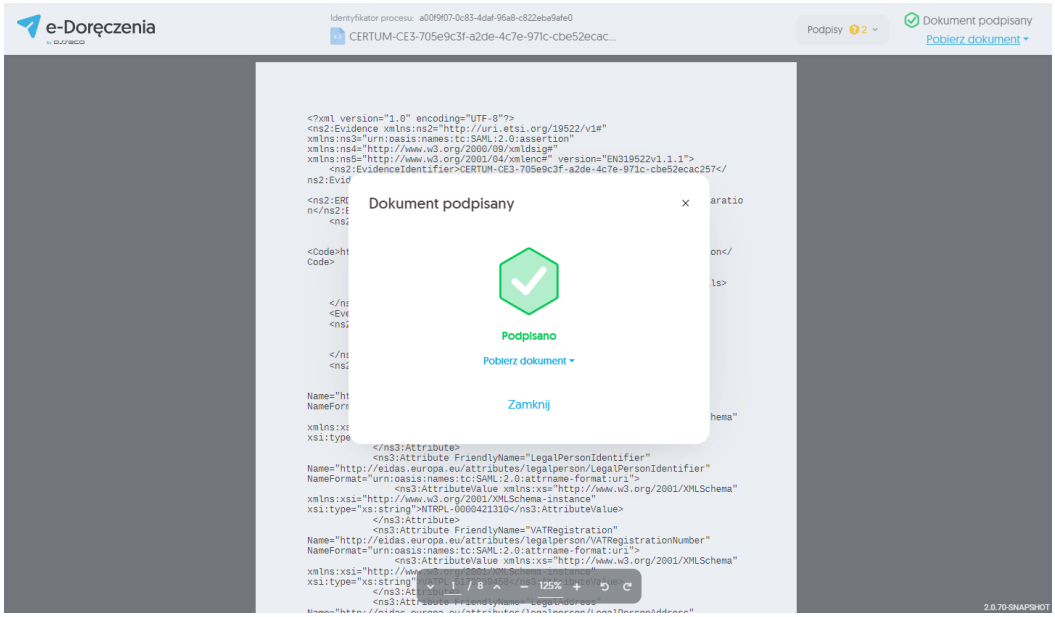

Figure 58.7: ***Acceptance of "Registered with e - signature" consignment - step 8.***

STEP 9: Another option available on this screen is the option to download the document. To do this, select the "***Download document***" option in the top right of the window.

The following options will then be displayed:

- "***Download document***" - in this case only XML information about the mail will be downloaded,
- "***Download with proof***"- in this case, XML information about the mail and a qualified validation report will be downloaded.

When you select "***Close***", you will return to the list of mail and you will see the mail you have just accepted.

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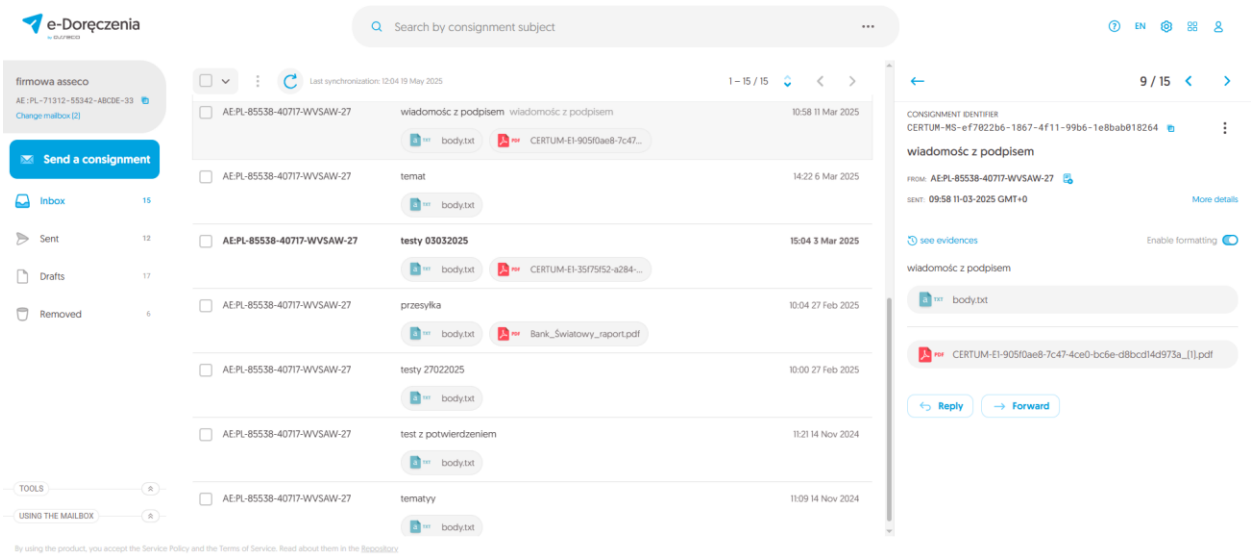

Figure 58.8: ***Acceptance of "Registered with e - signature" consignment - step 9.***

8.1.5 Rejecting consignment - "*Registered with e - signature*" mode.

STEP 1: This is a type of consignment in which the recipient must confirm receipt using an electronic signature. When you enter such mail in the list of consignment, you will be prompted to confirm receipt of this consignment. If the User wants to reject the consignment with stating a reason, then they should select the option " ***Reject the consignment and give a reason*** ".

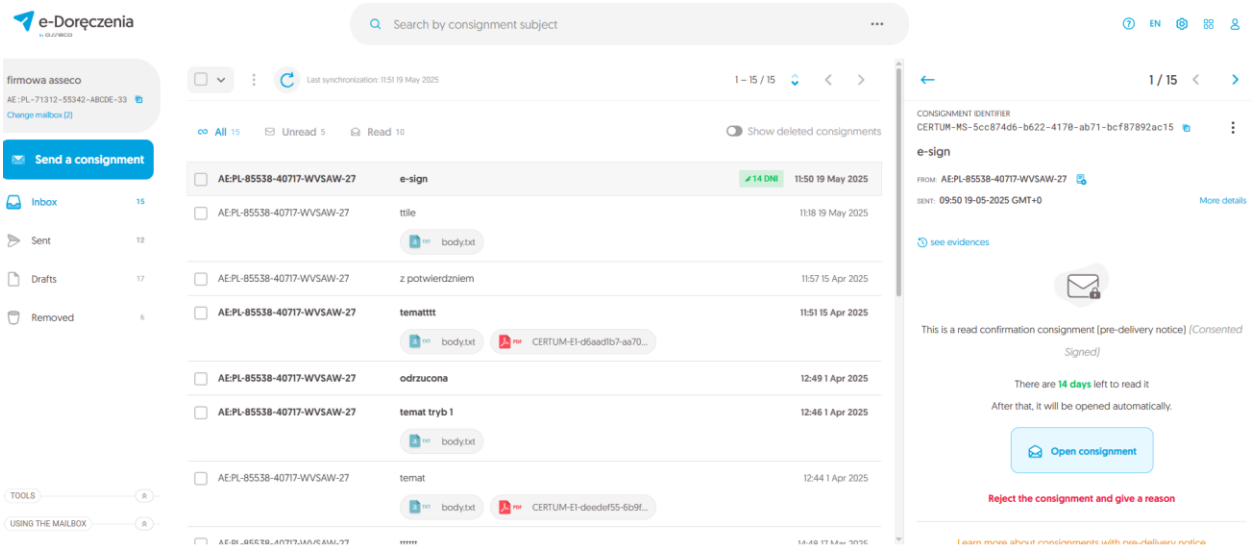

Figure 59: ***Rejection of "Registered with e - signature" consignment - step 1.***

certum.pl
infolinia@certum.pl

STEP 2: After selecting the option to reject the consignment, you are redirected to the next window.

The available options for the reason for refusal of receipt are:

- "I refuse to accept this consignment";
- "The consignment address is incorrect";
- "Incorrect consignment address ".

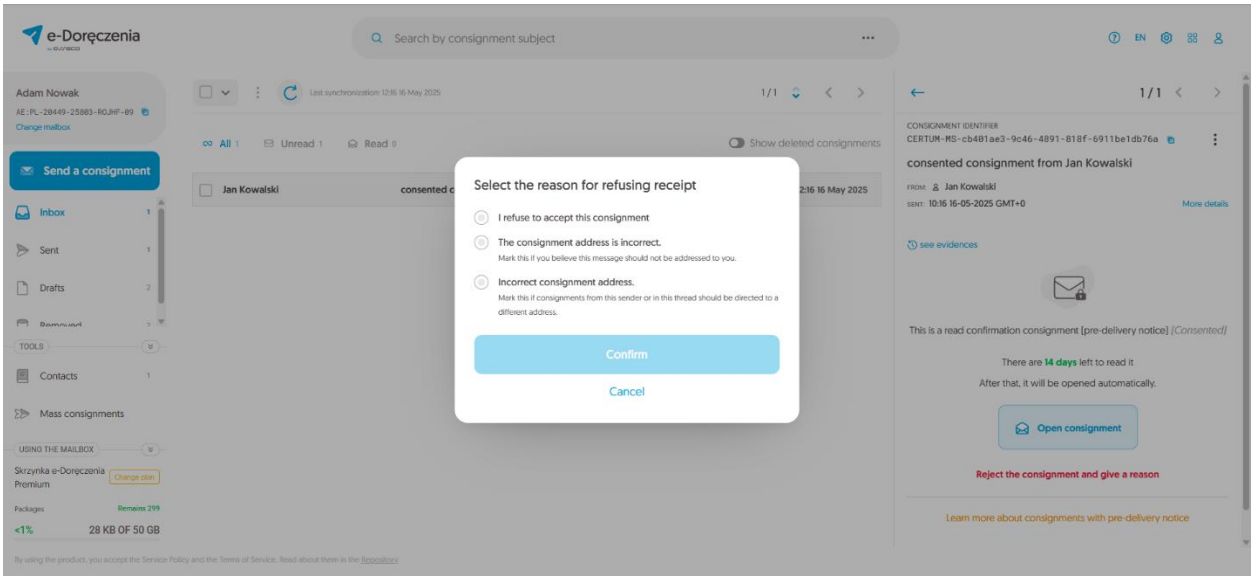

Figure 60.1: ***Rejection of "Registered with e - signature" consignment - step 2.***

STEP 3: After going through the step of providing a reason for rejection, the electronic signature process will begin. Once the electronic signature is performed, the contents of the consignment will be downloaded from the server.

The consignment can also be received - in this case, this action must also be confirmed with an electronic signature.

Currently, it is possible to select signature media, such as:

- “SimplySign";
- “Local signature";
- “I do not have a signature”.

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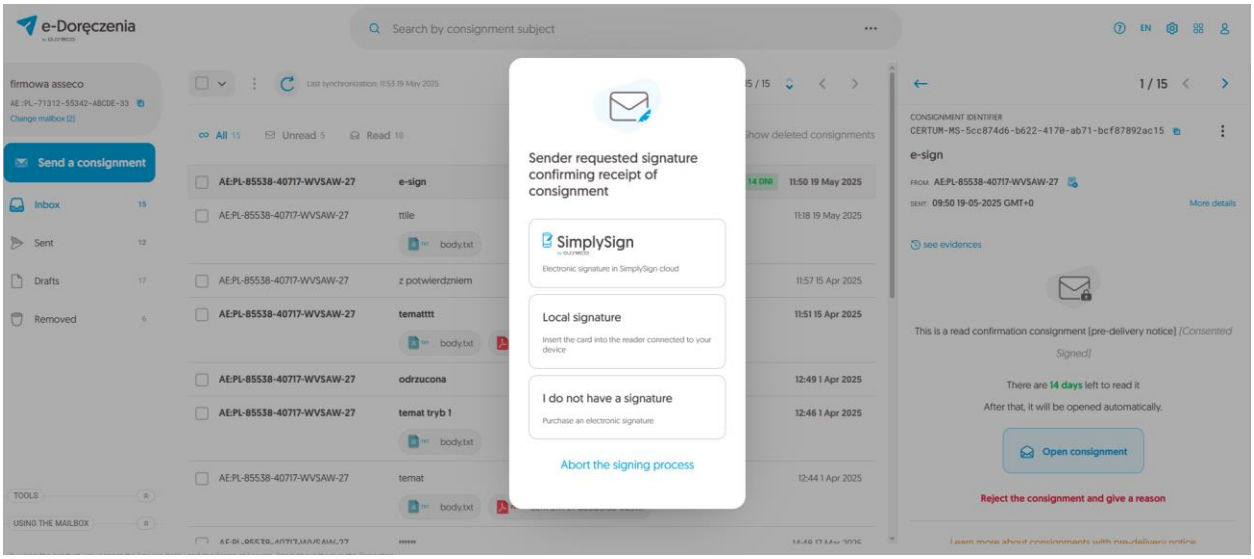

Figure 60.2: ***Rejection of "Registered with e - signature" consignment - step 3.***

STEP 4: Depending on the choice of signature medium, the User will be redirected to the appropriate process for signing documents.

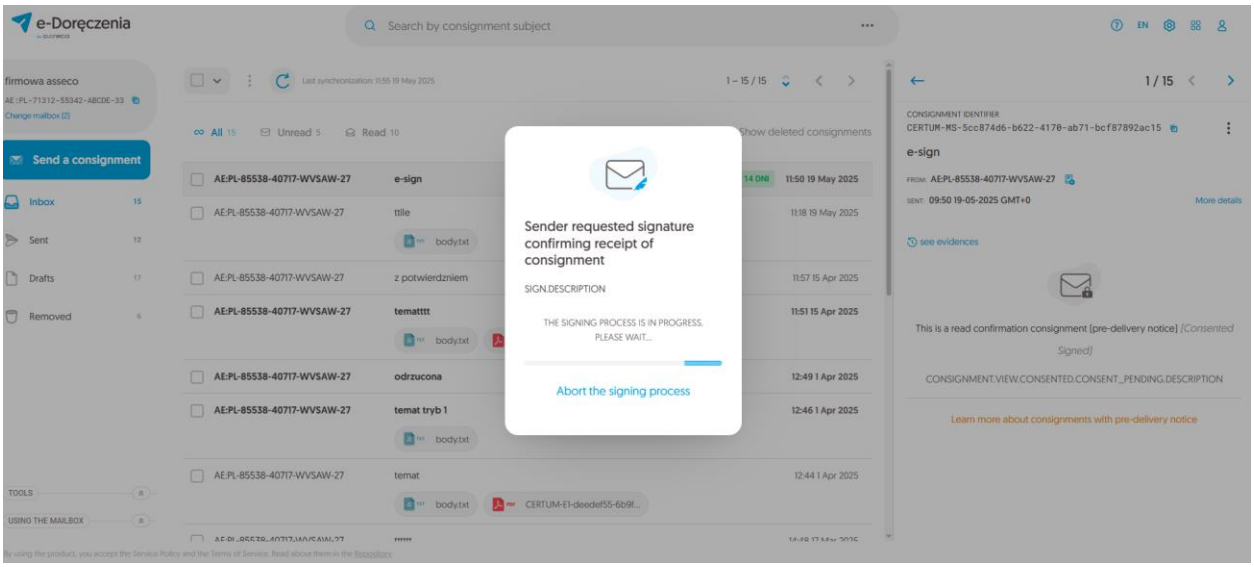

Figure 60.3: ***Rejection of "Registered with e - signature" consignment - step 4.***

STEP 5: After selecting it, a page will appear with a statement that the User will have to sign.

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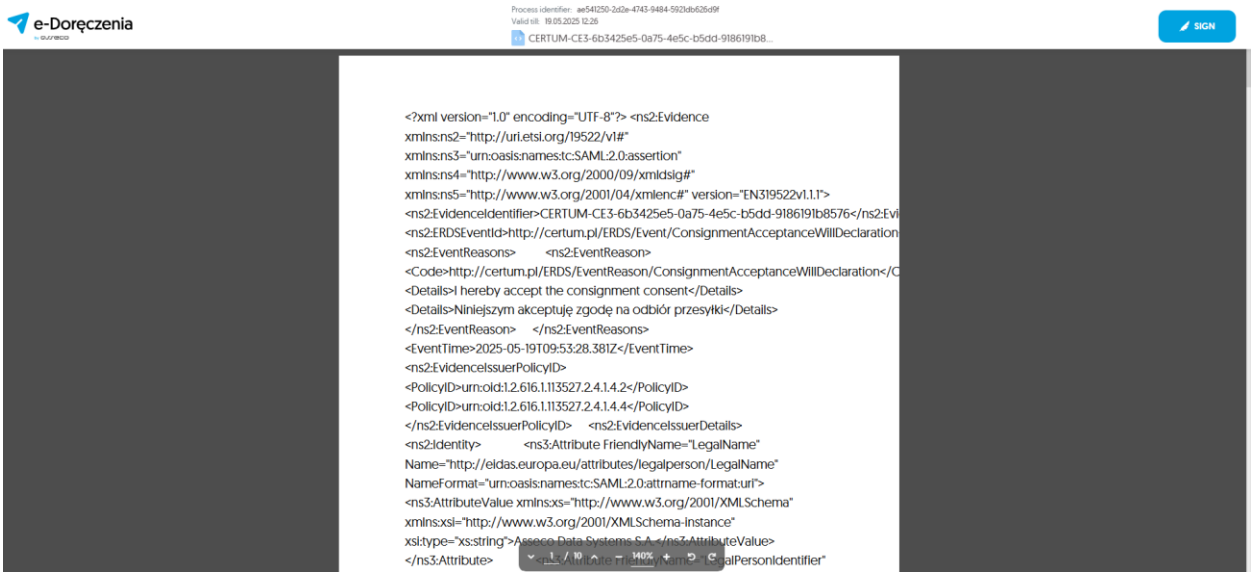

Figure 60.4: ***Rejection of "Registered with e - signature" consignment - step 5.***

STEP 6: To sign the document, select the option "***Sign***" in the upper right corner of the page. A window for logging into the SimplySign service will appear. After logging in, the User can use their certificate and sign the document.

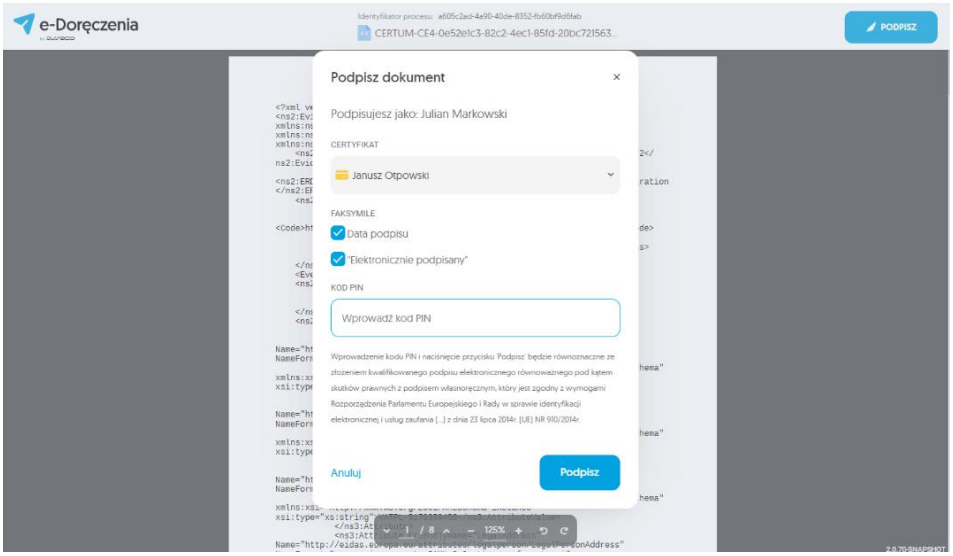

Figure 60.5: ***Rejection of "Registered with e - signature" consignment - step 6.***

STEP 7: After a successful signing of the document, a message will appear that the document has been signed. You can then close the signature process window and return to the active mailbox.

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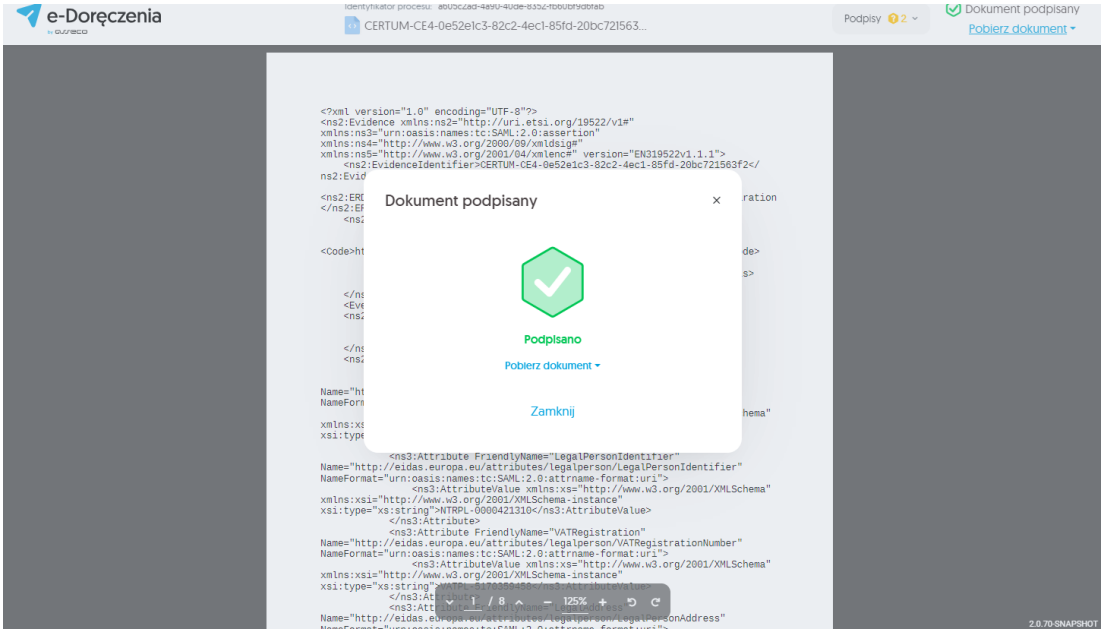

Figure 60.6: ***Rejection of "Registered with e - signature" consignment - step 7.***

STEP 8: Another option available on this screen is the option to download the document. To do this, select the "***Download document***" option in the top right of the window.

The following options will then be displayed:

- "***Download document***" - in this case only XML information about the mail will be downloaded,
- "***Download with proof***"- in this case, XML information about the mail and a qualified validation report will be downloaded.

The rejected consignment will contain information about the fact that it is rejected consignment, the date of the rejection action and the reason for rejection selected by the user will also be recorded.

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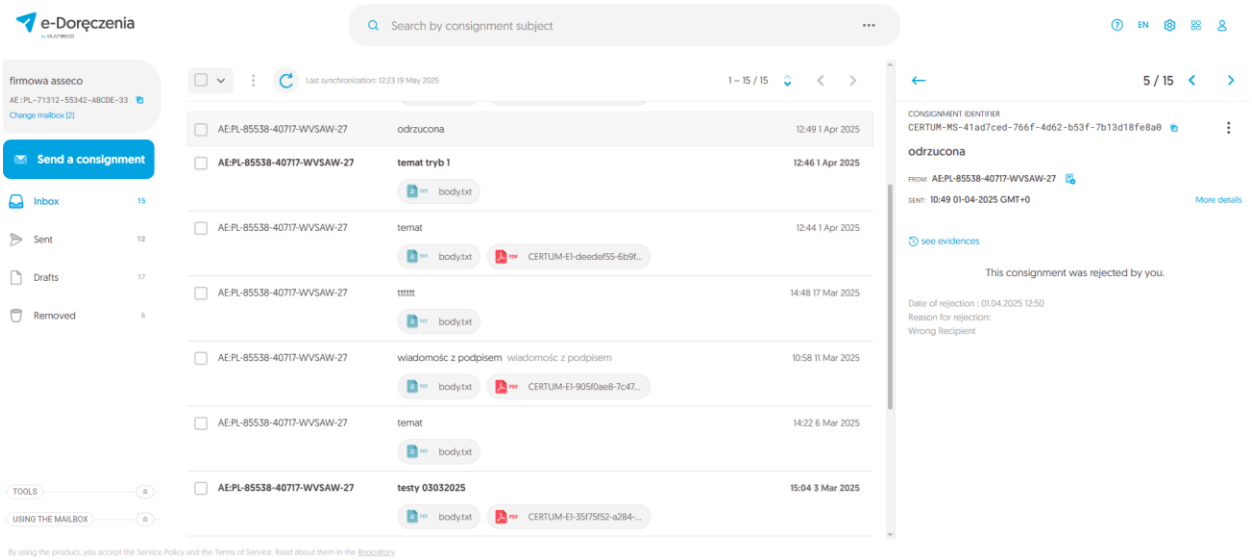

Figure 60.7: ***Rejection of "Registered with e - signature" consignment - step 8.***

8.1.6 Activities related to the received consignment

For a consignment that is in the "***Inbox***" folder, the following options are available:

- *"Mark as unread*";
- *"Mark as read*";
- *"Accept consignment";*
- *"Reject consignment";*
- *"Add or remove labels*";
- *"Move to folder*";
- *"Print*";
- *"Remove content*".

ATTENTION!

Accept consignment – the option appears in the menu when there are uncollected consignment on the list that require confirmation of receipt or electronic signature. Reject consignment – the option appears in the menu when there are uncollected consignment on the list that require a receipt or electronic signature.

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The options are accessed by selecting a consignment in the consignment list and using the three dot symbol located in the header of the consignment table. This situation is illustrated in the image below. Individual actions are described in the following sub-chapters.

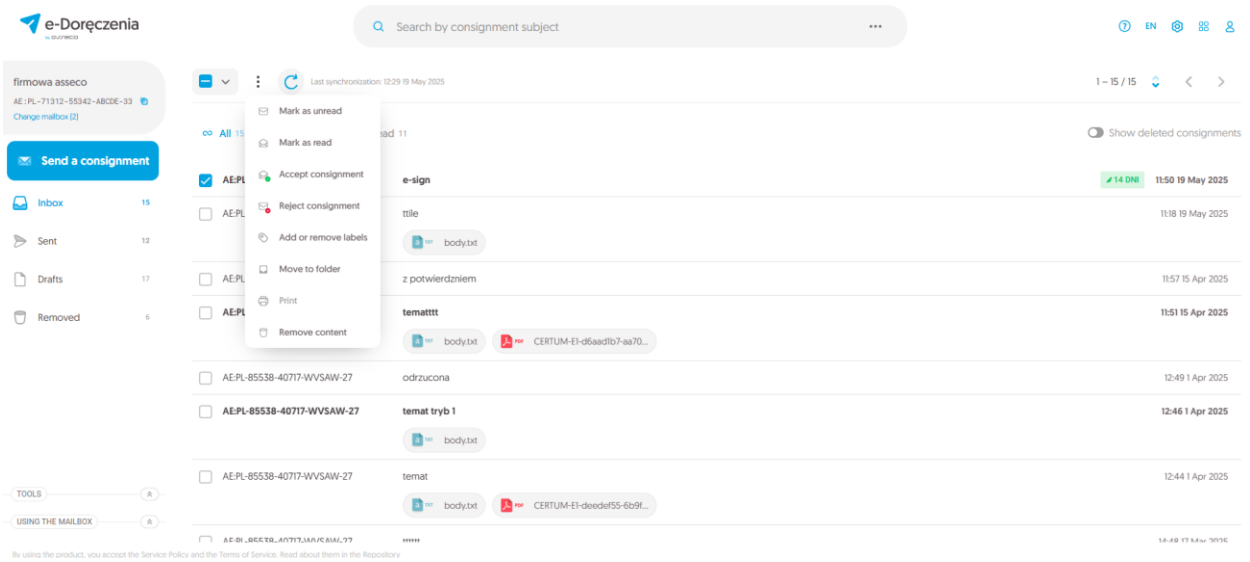

Figure 61: ***Actions on consignment inbox*****.**

"Mark as unread"

Selecting this option will mark the consignment as unread.

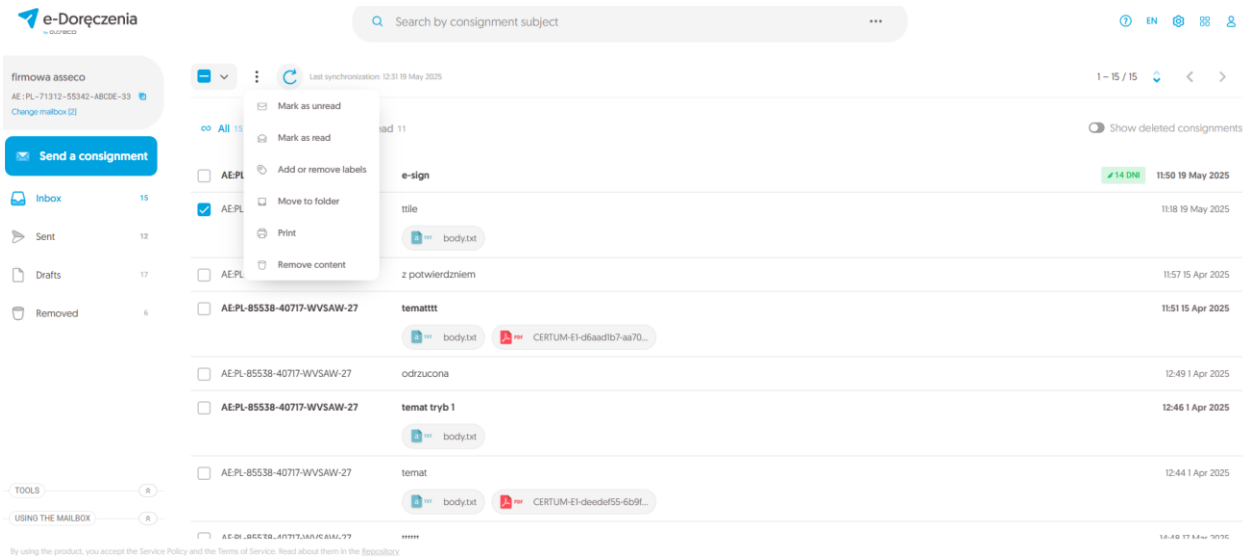

Figure 62: ***Marking received consignment as unread*****.**

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“Mark as read"

Selecting this option will mark the mail as consignment.

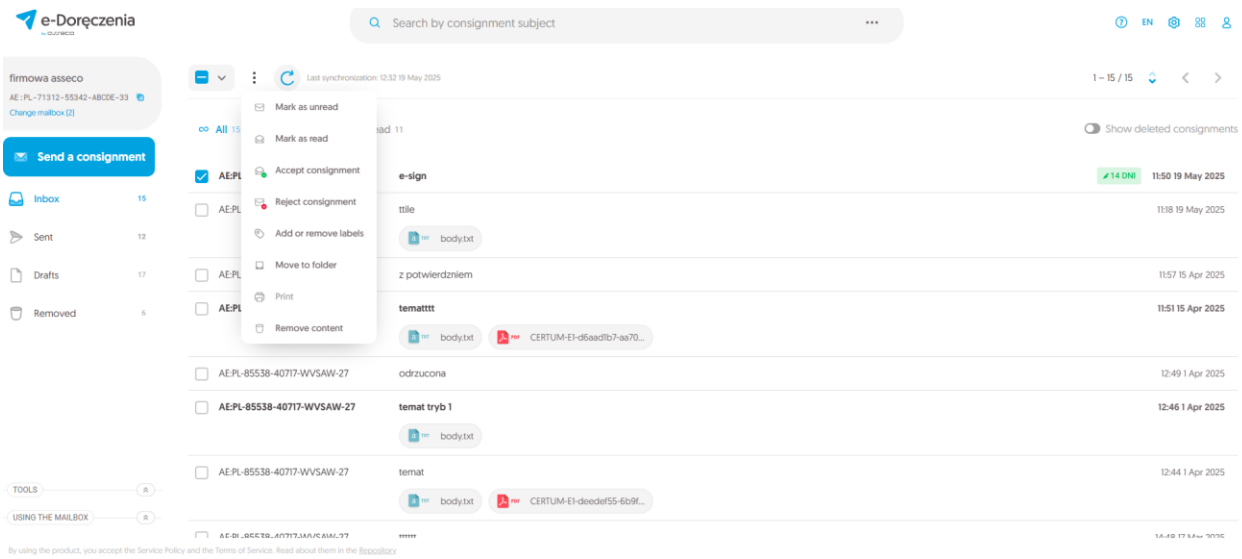

Figure 63: *Marking received consignment as read*.

"*Add or remove labels*"

STEP 1: Selecting the option "***Add or remove labels***" allows you to add or remove a label to the selected received consignment.

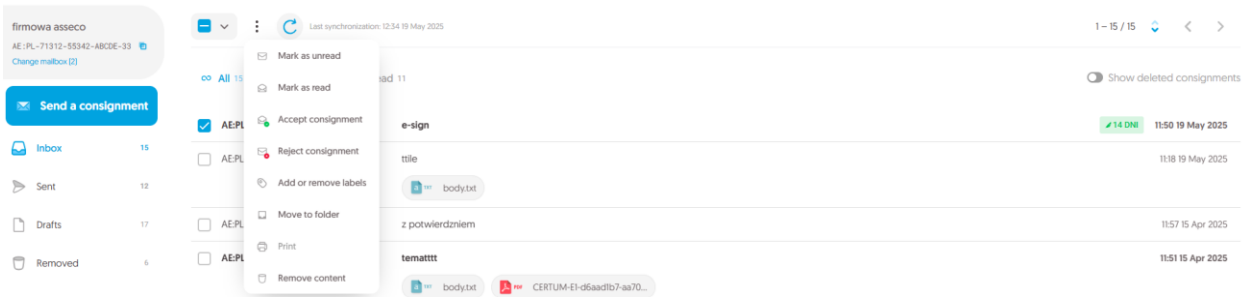

Figure 64: *Marking received consignment with a label - step 1*.

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STEP 2: Click on the label icon.

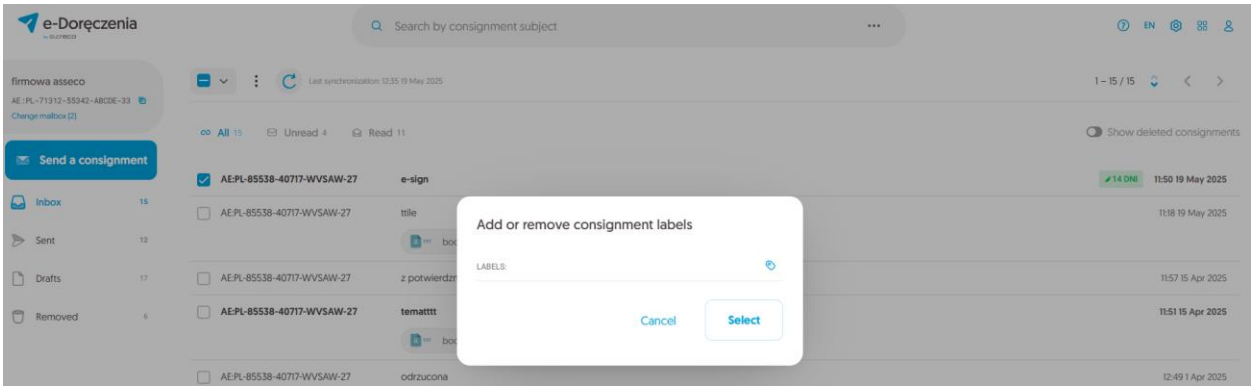

Figure 64.1: ***Marking received consignment with a label - step 2.***

STEP 3: The labels previously created for marking will then appear. Select the appropriate one.

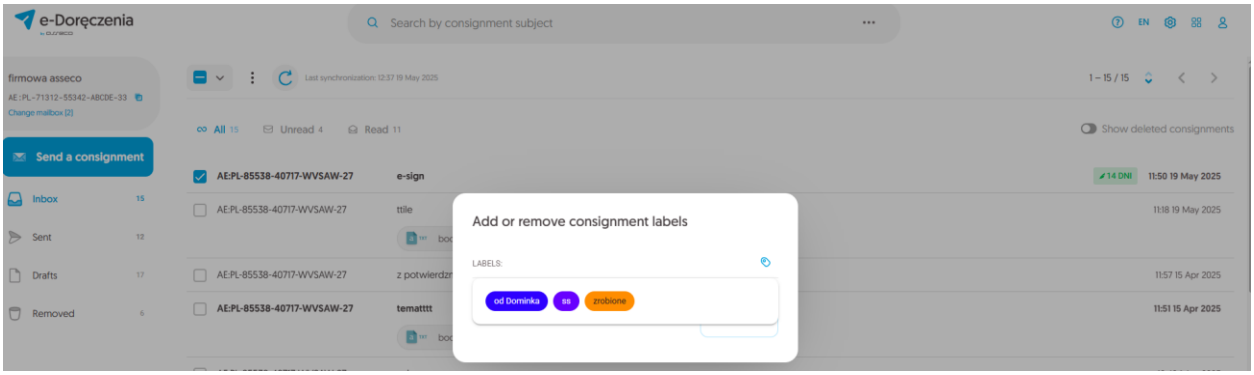

Figure 64.2: ***Marking received consignment with a label - step 3.***

STEP 4: The selected label will then appear as added.

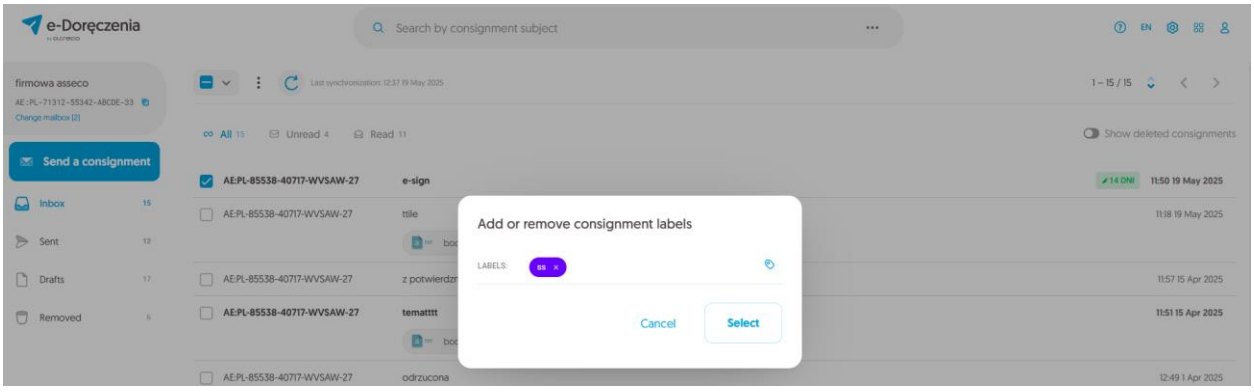

Figure 64.3: ***Marking received consignment with a label - step 4.***

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STEP 5: The added label will then appear next to the mail labeled with it.

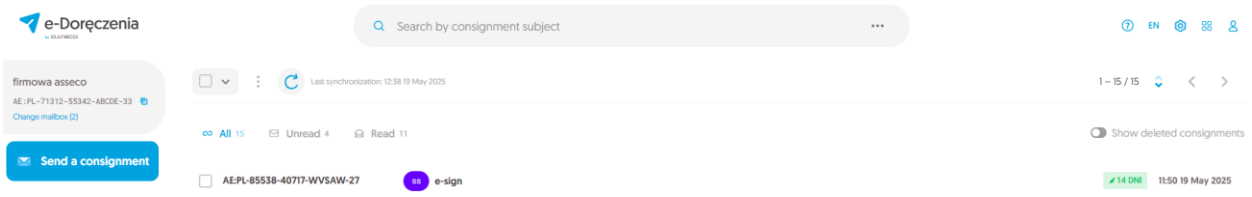

Figure 64.4: ***Marking received consignment with a label - step 5.***

"Move to folder"

STEP 1: Selecting this option allows you to move the selected mail to another folder.

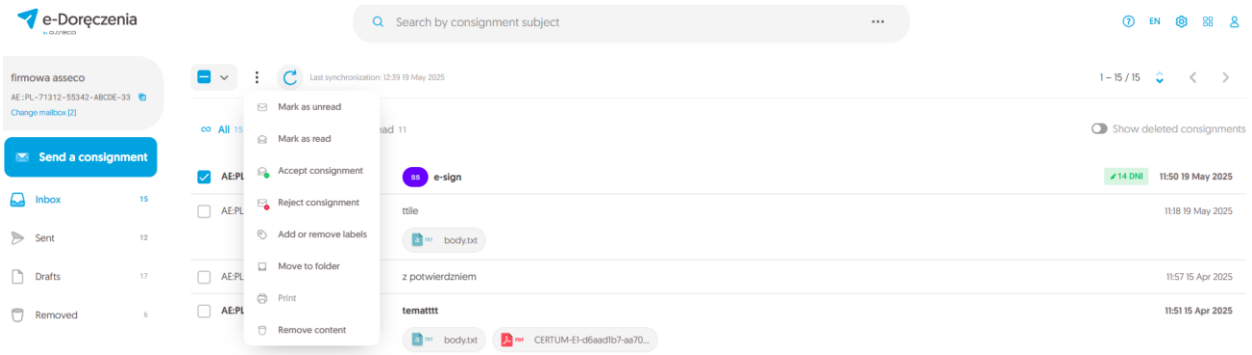

Figure 65: ***Moving received consignment to a folder - step 1.***

STEP 2: Choose to which previously created folder the selected mail should be moved.

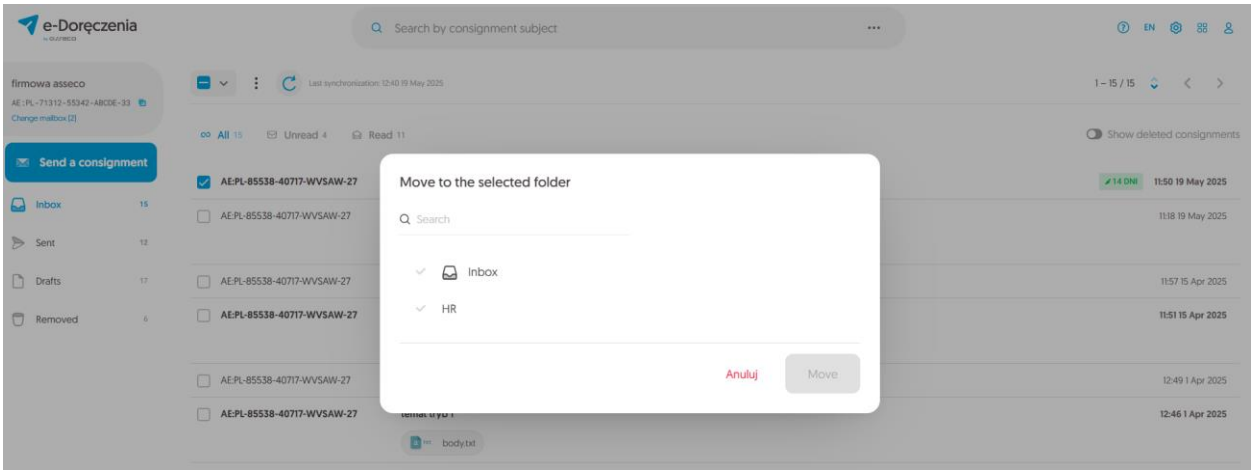

Figure 65.1: ***Moving received consignment to a folder - step 2.***

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STEP 3: After selecting the appropriate folder, select the "***Move***" option.

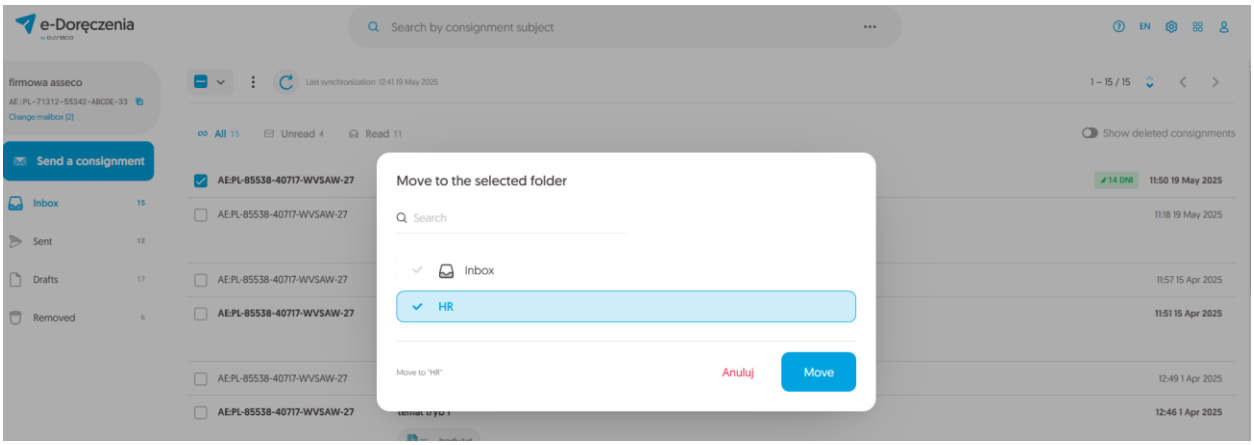

Figure 65.2: ***Moving received consignment to a folder - step 3.***

STEP 4: The transferred consignment will go to a folder previously selected by the User.

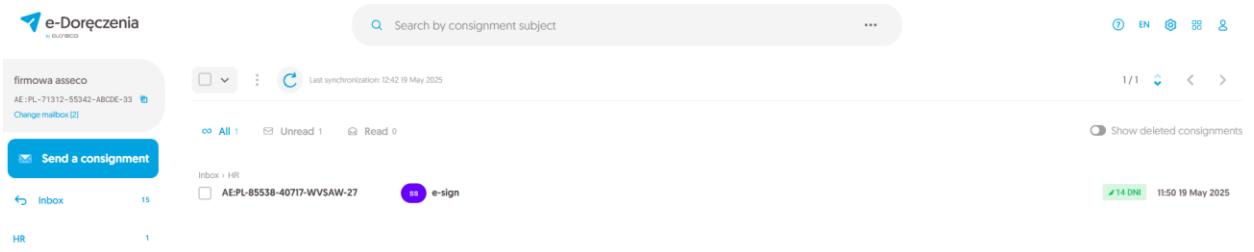

Figure 65.3: ***Moving received consignment to a folder - step 4.***

"*Print*"

STEP 1: Selecting this option allows you to print or save the contents of the consignment in the PDF format.

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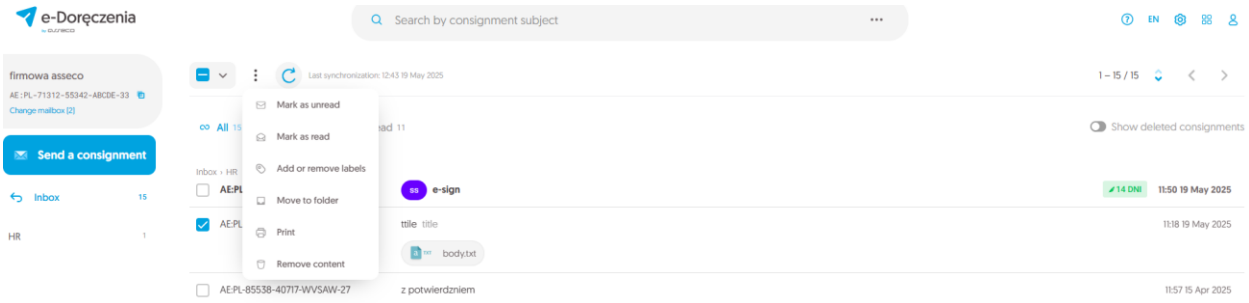

Figure 66: ***Printing the received consignment - step 1*****.**

STEP 2: After selecting the "***Print***" option, the process of downloading the consignment in ZIP format will begin.

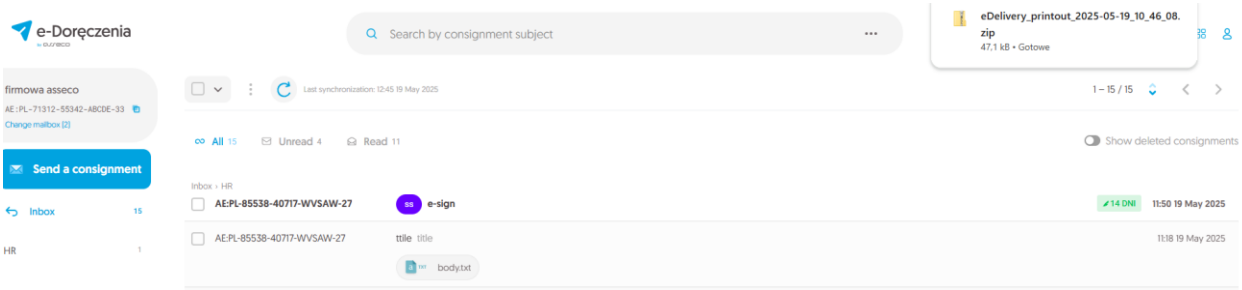

Figure 66.1: ***Printing the received consignment - step 2*****.**

STEP 3: After navigating to the "***Downloads***" folder, the user can unzip or access the downloaded file.

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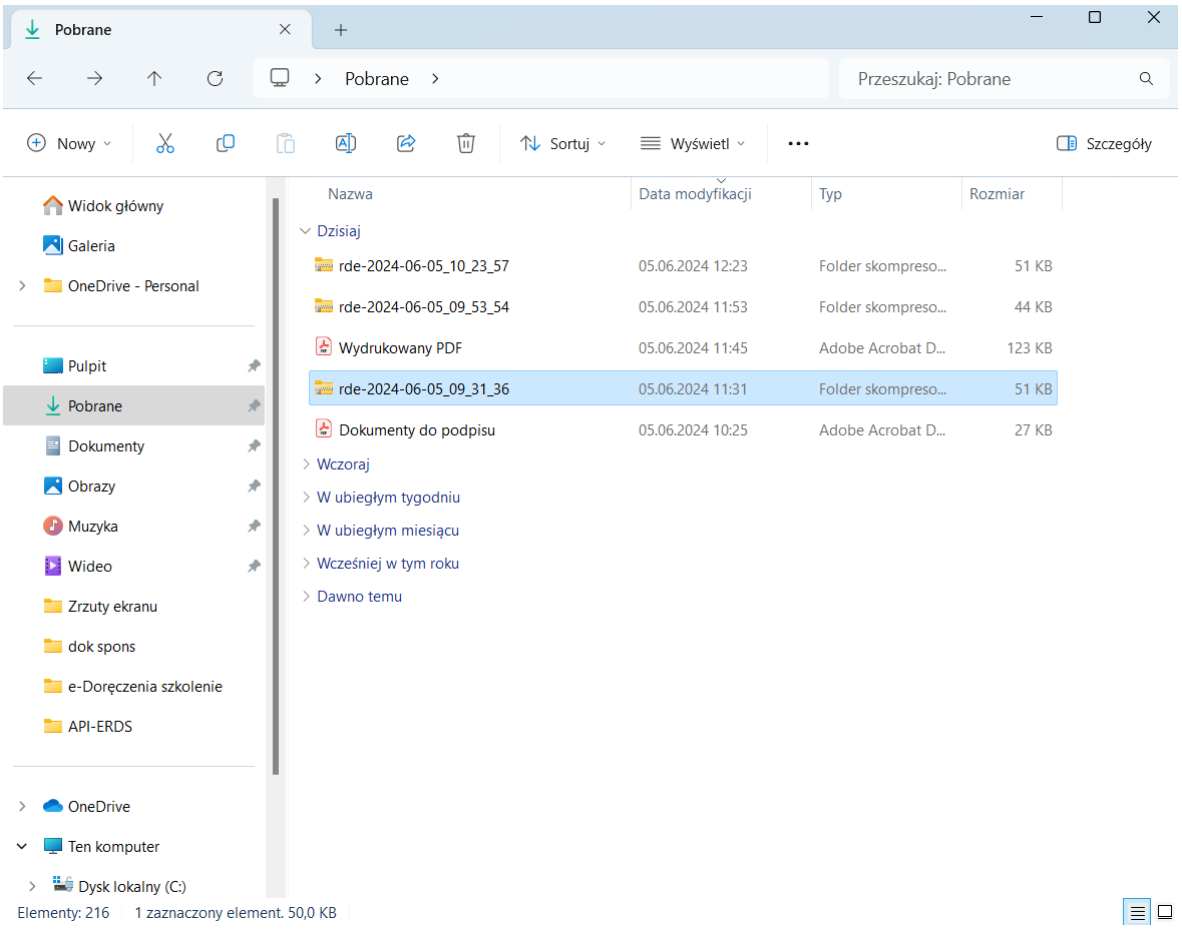

Figure 66.2: ***Printing the received consignment - step 3*****.**

STEP 4: After unzipping or accessing the downloaded file, you may encounter consignment in PDF format.

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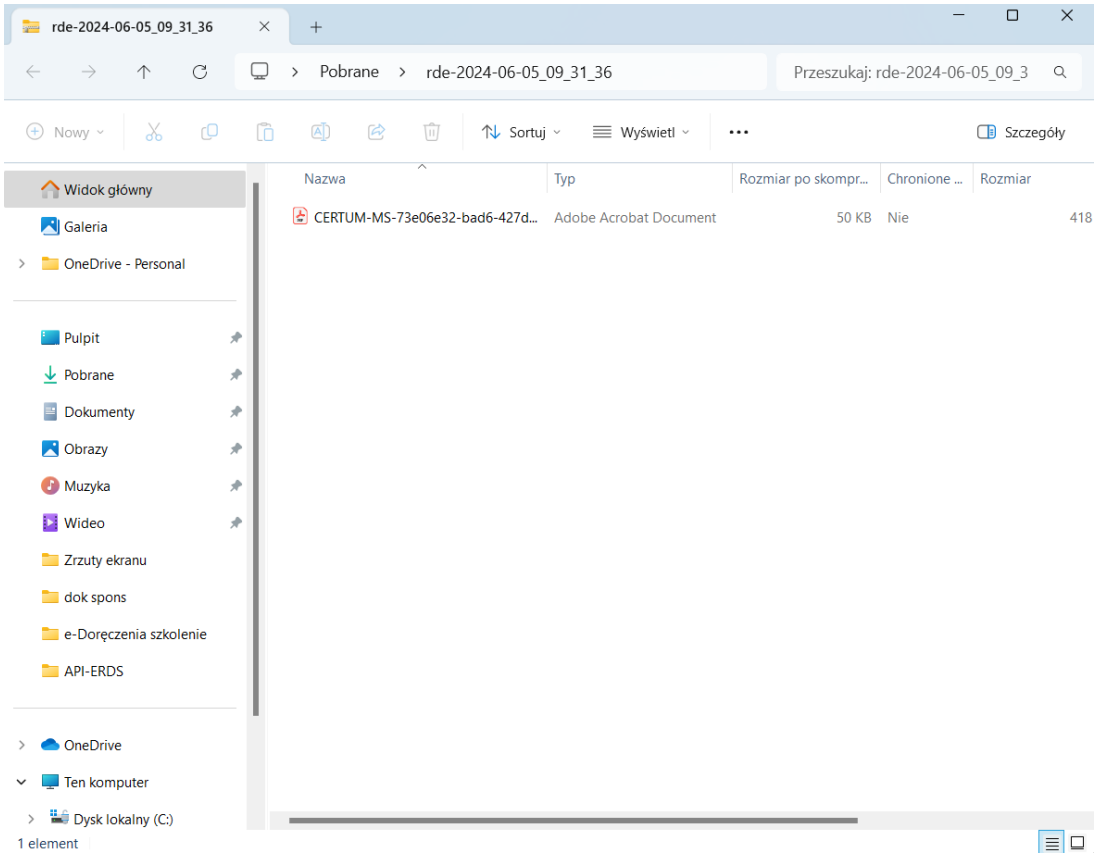

Figure 66.3: ***Printing the received consignment - step 4.***

STEP 5: After selecting the program that handles the files, the User can proceed to the option of printing the document, as usually done in other cases.

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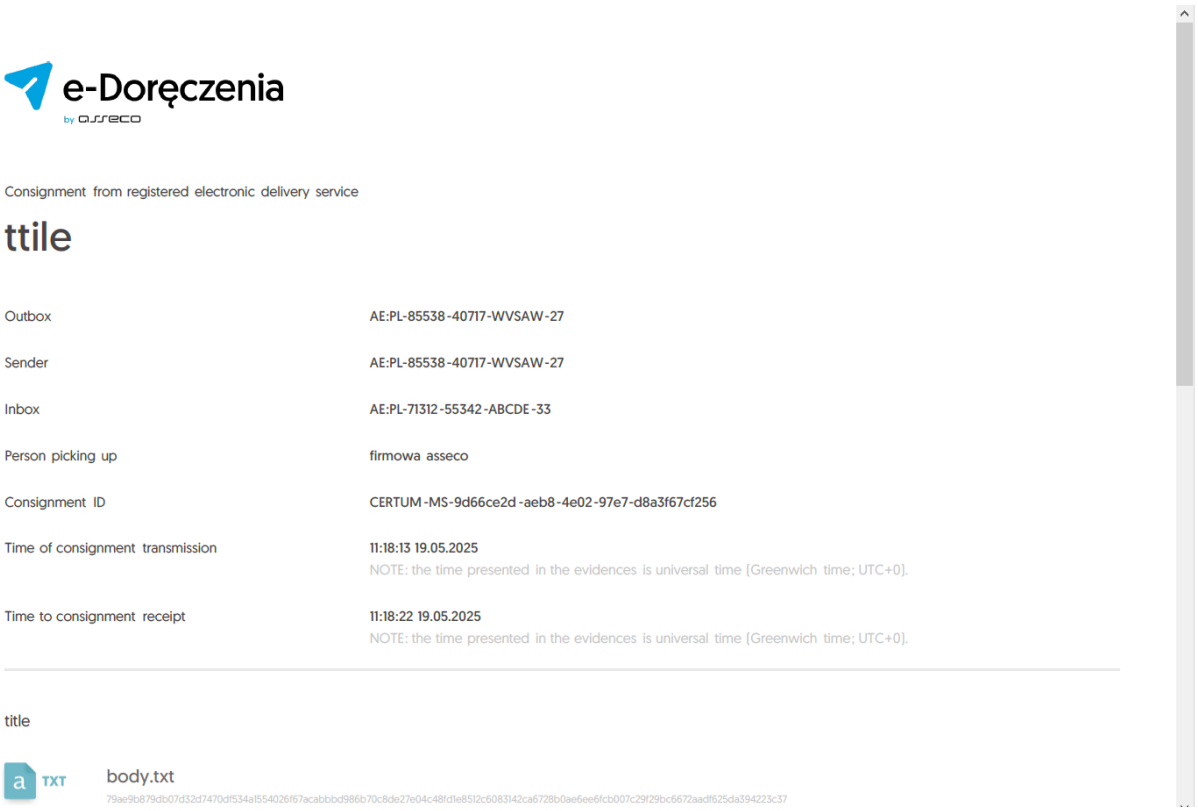

Figure 66.4: *Printing the received consignment - step 5*.

"***Remove content***"

STEP 1: Selecting this option will move the selected consignment to the "***Remove content***" folder.

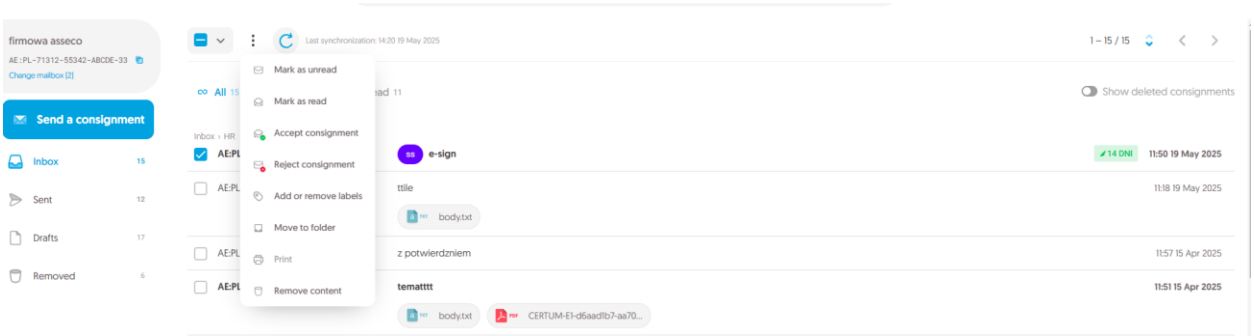

Figure 67: *Deletion of contents of received consignment - step 1*..

STEP 2: When the action is successfully performed, a message will be shown about the deletion of the content and attachments of the consignment.

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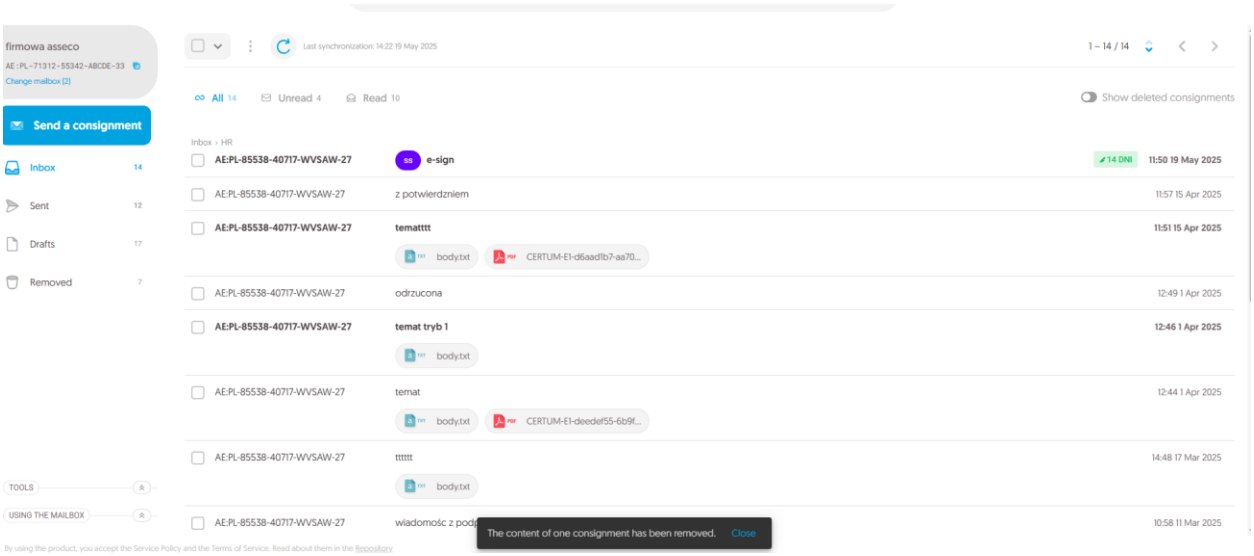

Figure 67.1: ***Deletion of contents of received consignment - step 2.*.**

STEP 3: In order for the User to be able to find the “digital envelope” or “digital advice note” that is left after deleting the content of the package and its evidence, they must go to the "***Removed***” folder in the Mailbox Management Panel.

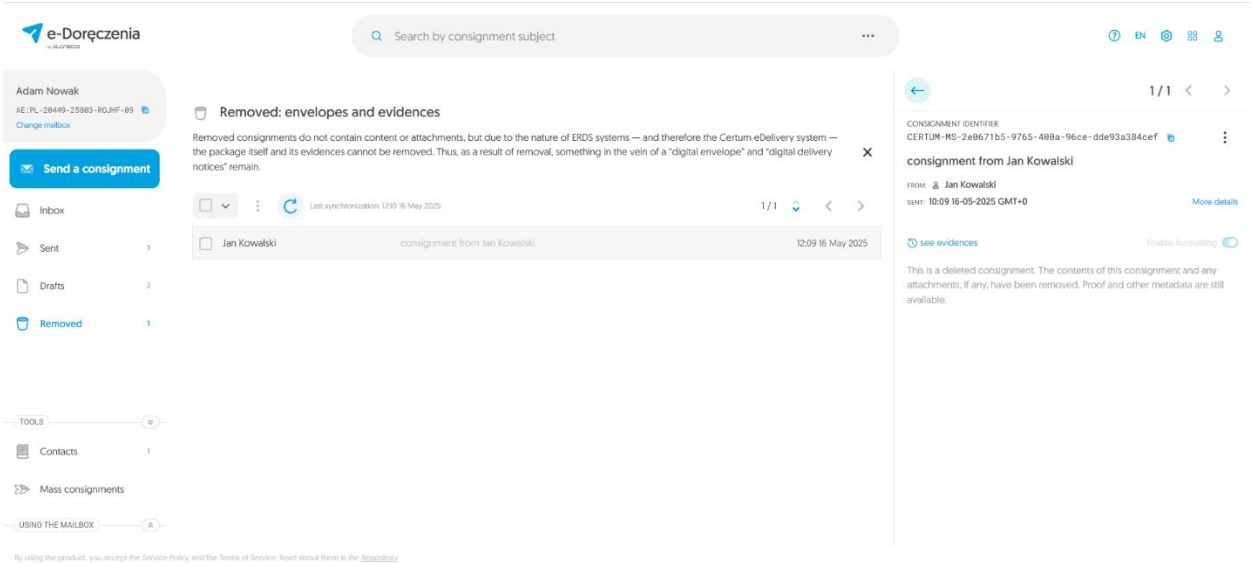

Figure 67.2: ***Deletion of contents of received consignment - step 3.*.**

8.1.7 Content and additional information about the consignment

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After selecting any consignment and optionally confirming receipt, the contents of the consignment will be presented on the right side along with additional information.

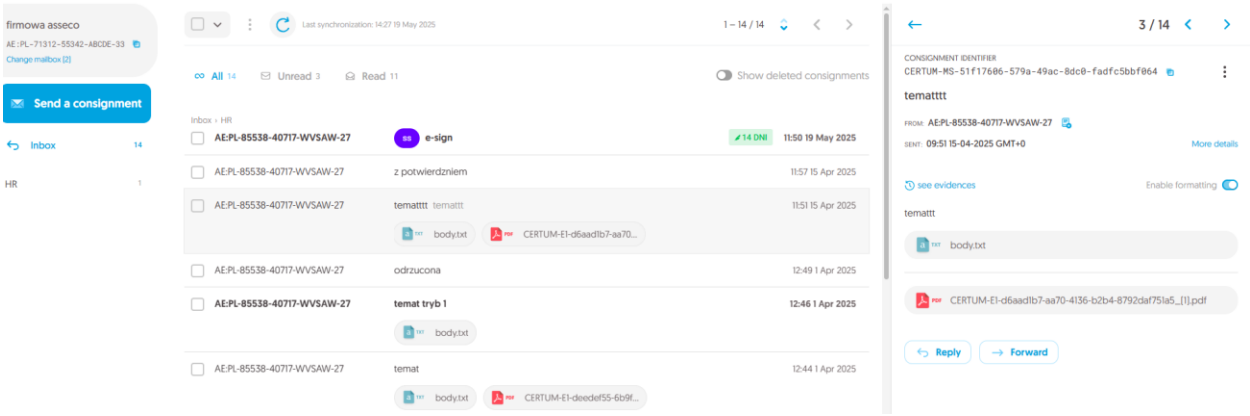

Figure 68: *Additional information about the consignment*.

The selected consignment is highlighted in gray in the consignment list.

The consignment details are divided into the following sections:

1. *"Navigation bar"* – using the greater-than and less-than sign buttons, you can navigate between mail;
2. *"Consignment identifier*" – the individual number of each mail;
3. *"Consignment title*";
4. *"RECEIVED ON"* – the date of receipt of the mail (time, day, month, year);
5. *"FROM"* – information about the sender of the mail;
6. *"More details"* – mail information;
7. *"See evidences"* – a button that allows you to download electronic evidence associated with consignment;
8. *"Enable formatting"* – if this option is enabled, it displays the consignment as customized by the sender. If this option is unchecked, the entire text is displayed in a string, with no division into paragraphs and lines;
9. "*Consignment content*" – consignment content displayed as plain text and body attachment;
10. "*Reply*" and "*Forward*" – buttons that allow you to reply or forward the consignment to another recipient."

Presented below are the consignment detail fields similarly labeled to the descriptive legend above.

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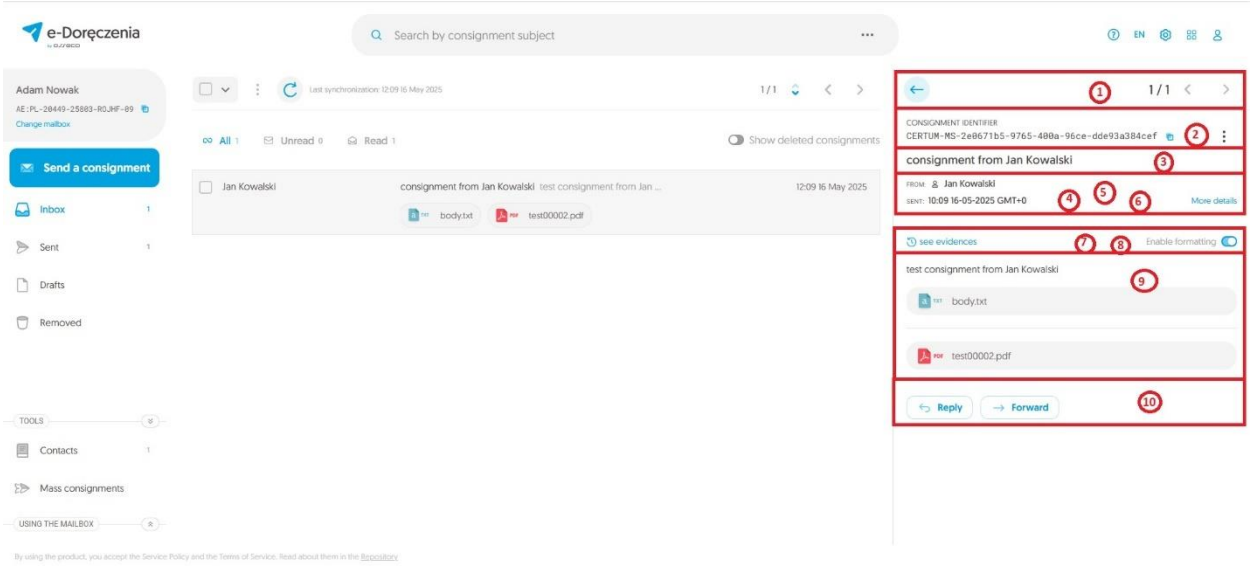

Figure 69: *Content and metadata of the consignment*.

If the User selects three dots next to the "***consignment identifier***" field, this will expand the action bar on the mail. Depending on the type of consignment, activities on the consignment may vary.

In the case of the below visible parcel, the actions that can be performed on it are:

- *"Mark as unread*";
- "Accept consignment";
- *"Reject consignment*";
- *"Add or remove labels*";
- *"Move to folder*";
- *"Export (with attachments)"*;
- *"Remove content*";
- *"Print*".

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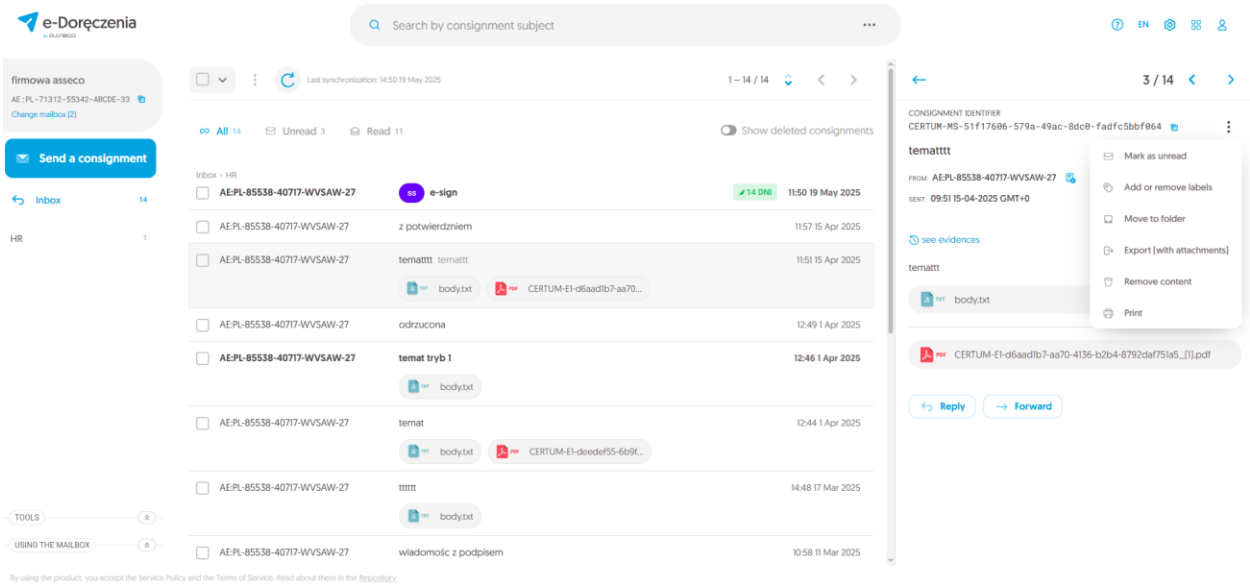

Figure 70: *Additional actions on the consignment*.

"*More details*" in the content of the consignment.

If the User wants to check more information about the consignment, they must select the "***More details***" option in the active mail.

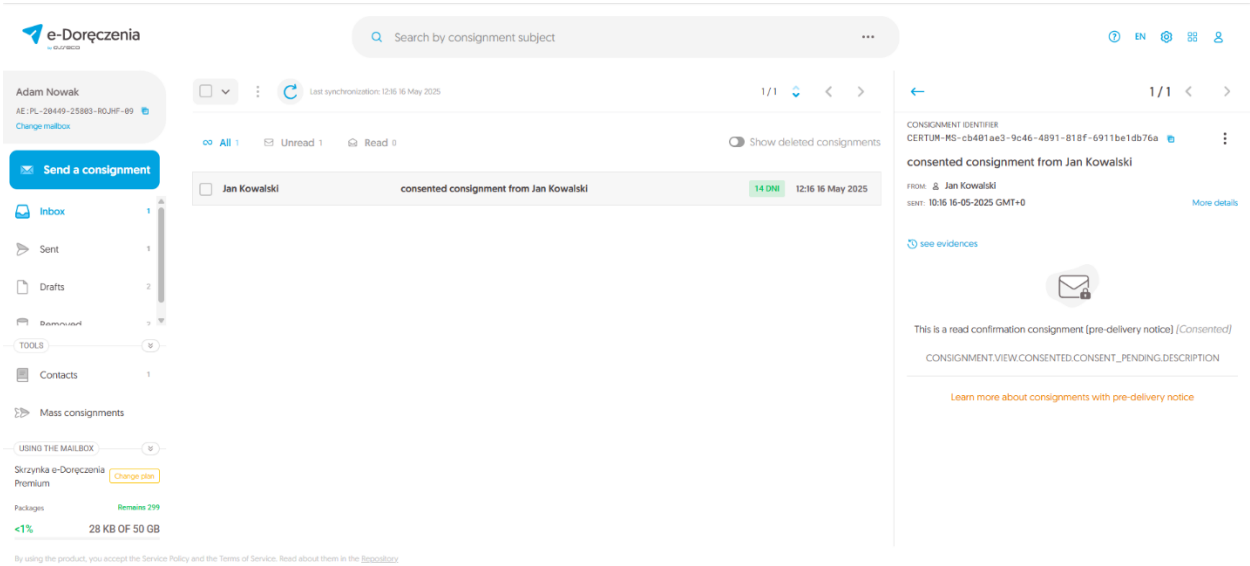

Figure 71: *"More details" option.*

It includes information such as:

- "*FROM (Sender)*";
- "*TO (Recipient)*";
- "*RECEIVED ON*" – the date of receipt of the mail (time, day, month, year);
- "*FOLDER*" – the name of the folder in which the mail is located;
- "*CONSIGNMENT IDENTIFIER*";
- "LABELS"
- "*CONSIGNMENT MODE*" – information on whether it is mail with confirmation of receipt;
- "*URGENT/OTHER MODE*".

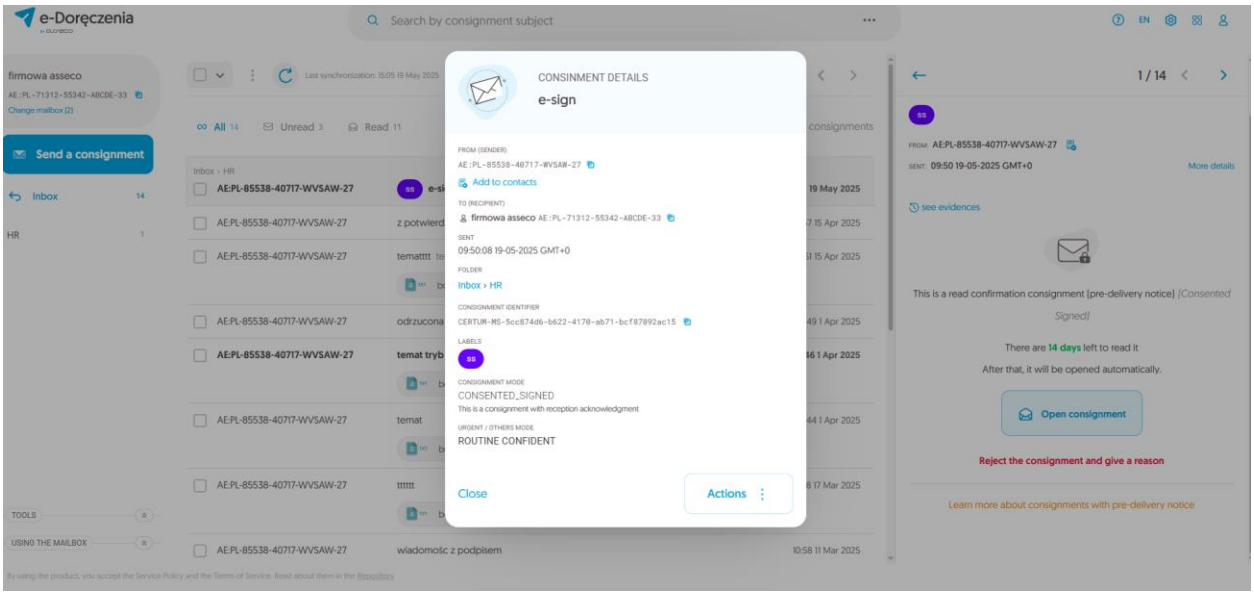

Figure 72: *Modal - "More details"*

In order for the User to perform actions on mail here, which were described in the previous sub-chapters, they must select the option "***Actions***."

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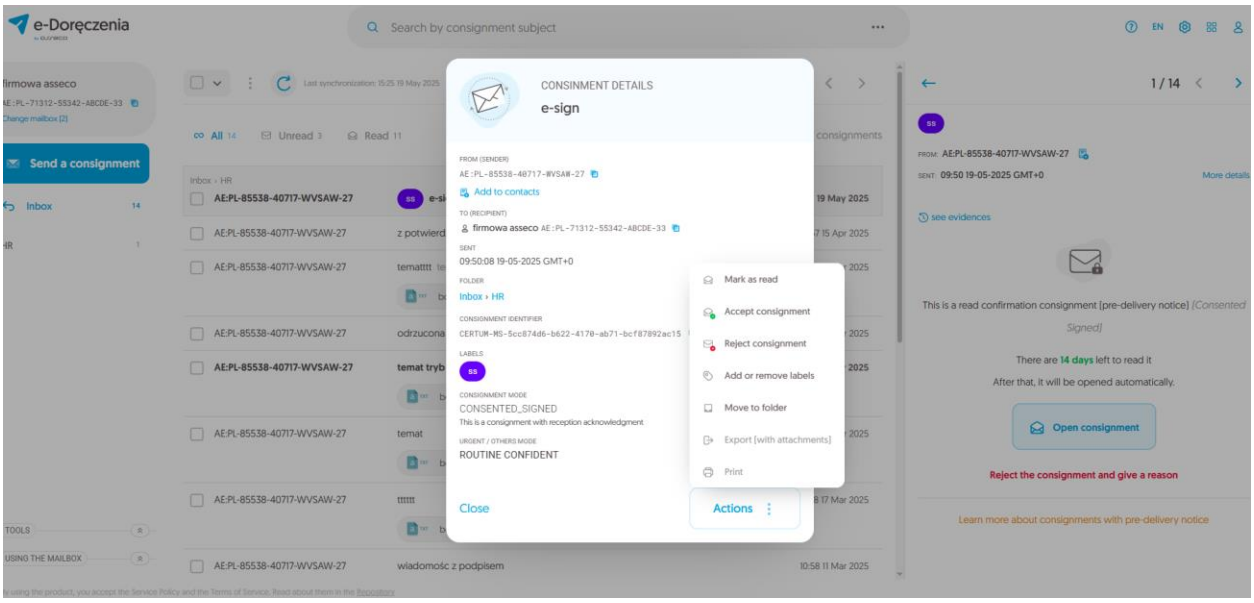

Figure 73: ***Actions on the selected consignment.***

Electronic proof related to the consignment

In the mail details, after selecting the option "***Proof for consignment***," a panel is displayed that allows you to download electronic proof for the selected consignment.

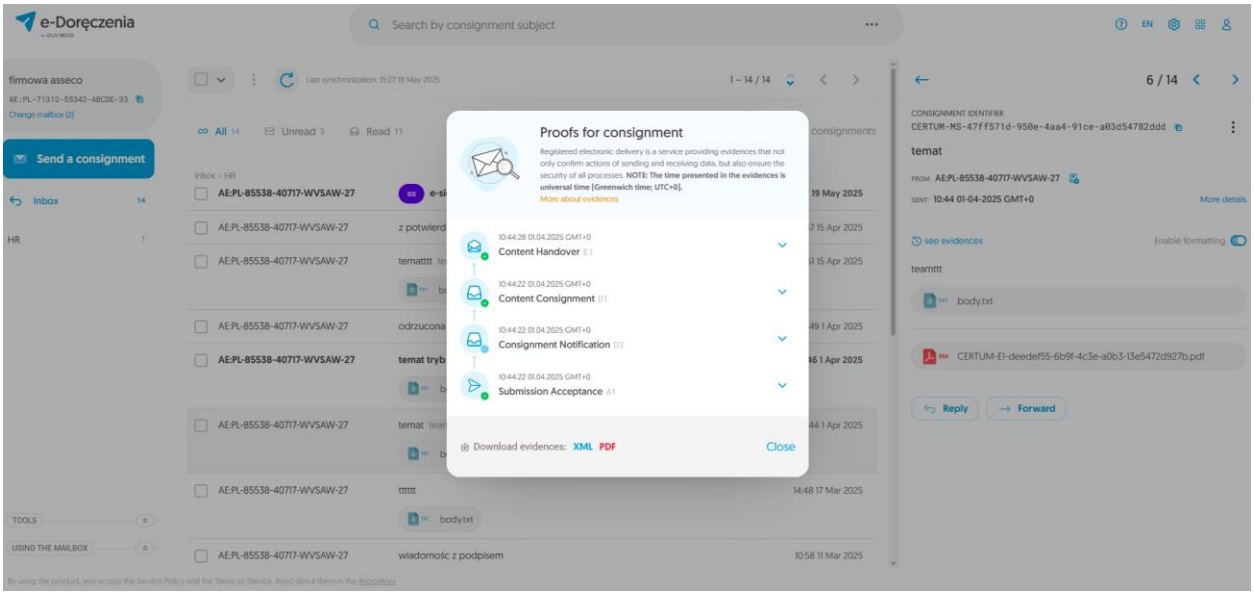

Figure 74: ***"Proof for consignment" Panel.***

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Proofs are generated for each event recorded in the e-Delivery system, which relates to the selected consignment. In the "***Proof for consignment***" panel, the saved proof is sorted according to the date it was created looking from the bottom to the top. The latest proof is always at the top. The panel allows you to download a single proof in XML or PDF format, or download all the proofs at once, in one of these formats in a ZIP package. To download a single proof, expand the proof information for the consignment.

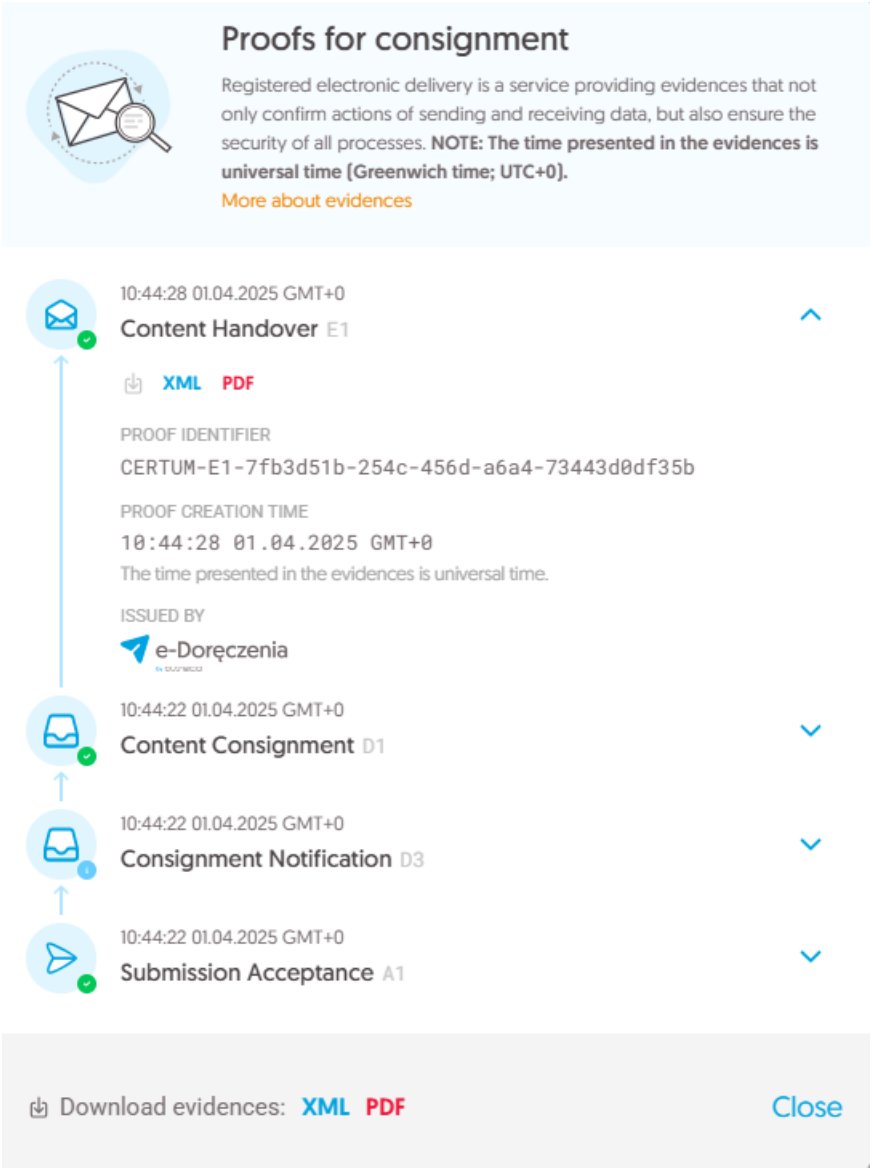

Figure 75: ***Expand proof details for a specific consignment.***

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How do I download proofs for all consignment?

To download all the proofs in either XML or PDF format at once, at the bottom of the "***Proofs for consignment***" panel next to the text "***Download evidences***" select "***XML***" or "***PDF***." In this case, **DO NOT** expand the proof details for a single consignment and download the proof there. Only a **SINGLE** proof would be downloaded then.

8.2 Action II: Sending consignment

STEP 1: To send a consignment select the "***Sign a consignment***" option. A window will appear, where you can choose the sender of the consignment. In the "***TO***", field, enter the recipient's ADE address. In this field, you can also select the address of a person previously saved in "***Contacts***". To access the contacts in this view, click the "*books*" icon. It is also necessary to enter the subject of the message in the "***SUBJECT***" field. Next, in the "***Enter the text of the consignment***" field, type the content of the consignment.

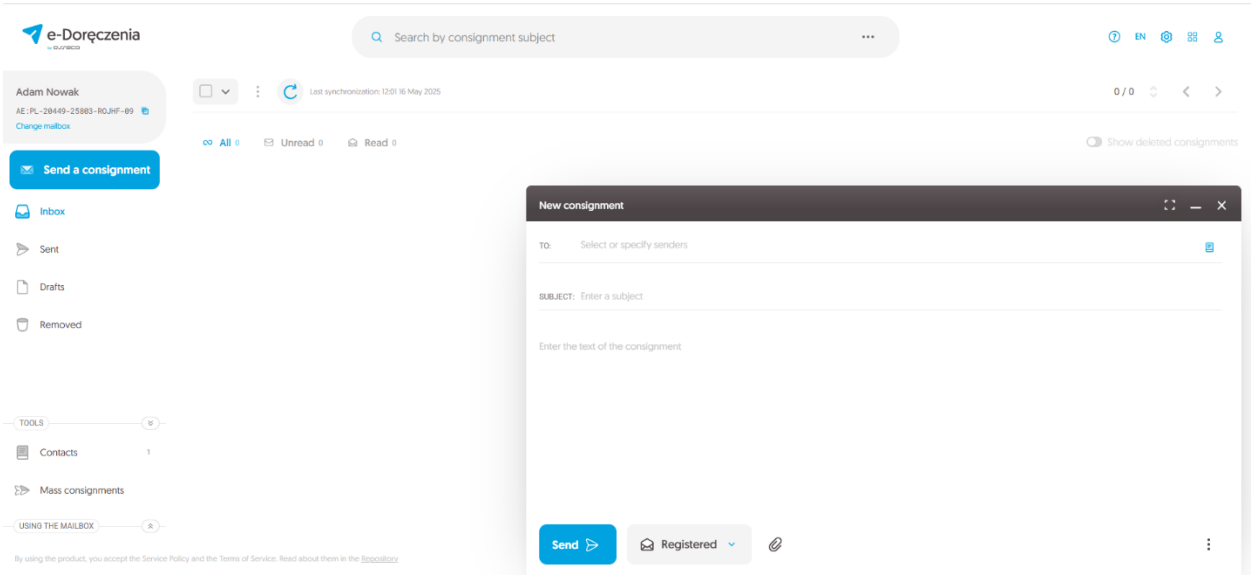

Figure 76: ***Sending a consignment – Step 1.***

STEP 2: After opening the contacts, you can select a recipient saved in the address book.

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Figure 76.1: ***Sending a consignment – Step 2.***

STEP 3: If the User has previously sent a consignment, clicking in the "***TO***" field will trigger a suggestion. Here, the user can also use the "***Select from contacts***" and "***Add contact***" options.

ATTENTION!

It is not possible to send a consignment to yourself.

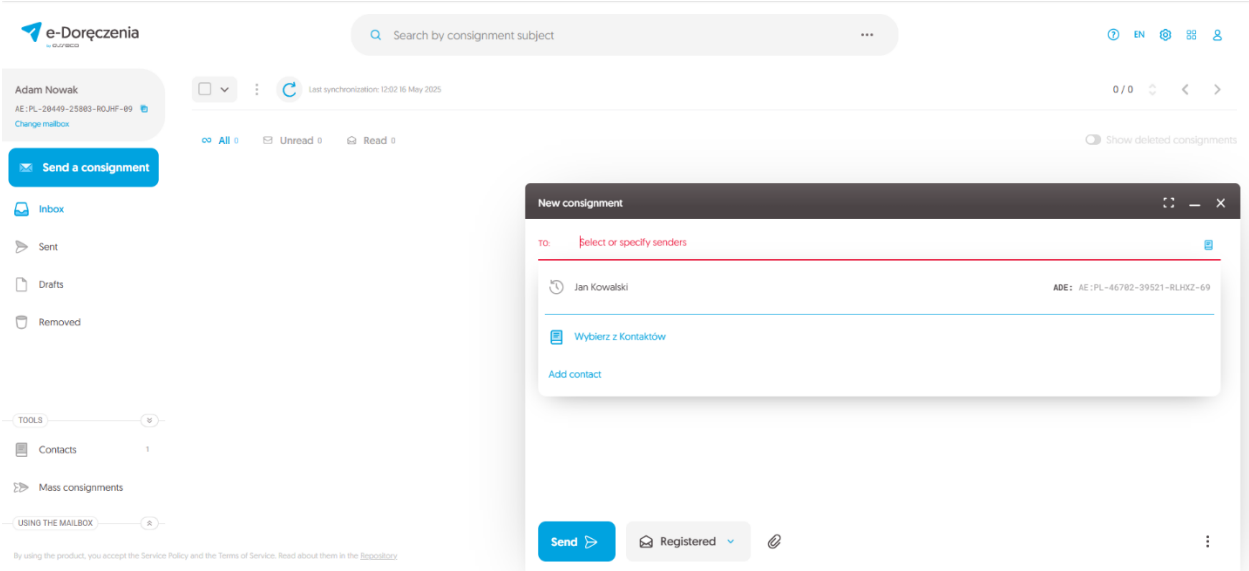

Figure 76.2: ***Sending a consignment – Step 3.***

STEP 4: If the User has not yet verified the selected contact in the "***Public address register***",a message will appear indicating that the user can use the "***Verify***" option or it will be done automatically during mail sending.

STEP 5: When creating a consignment, it is necessary to provide the consignment subject and content.

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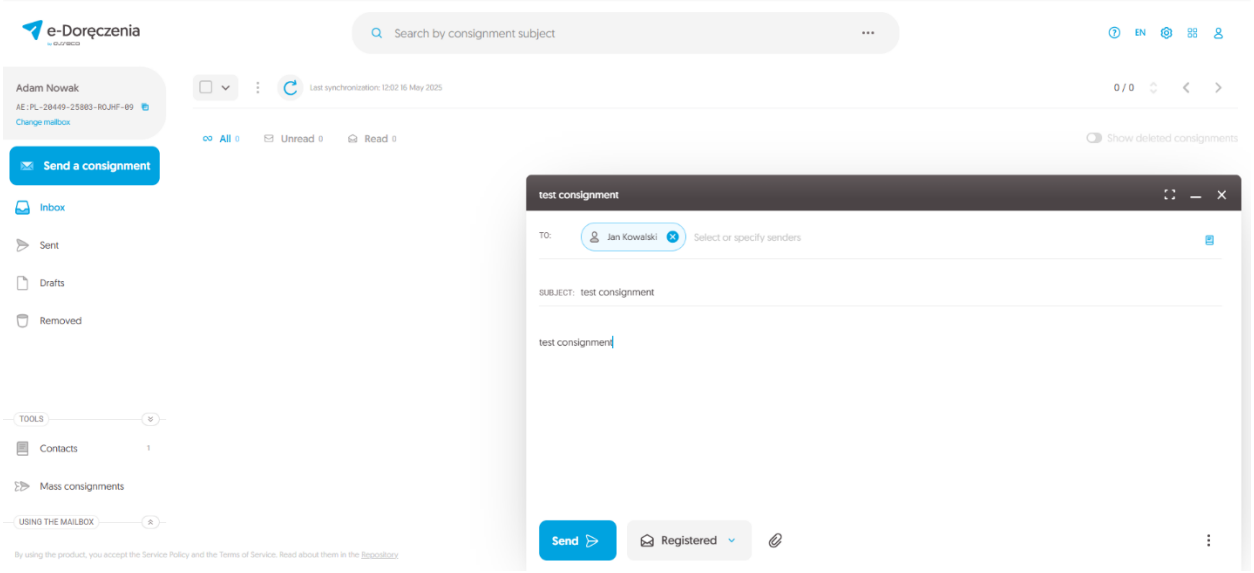

Figure 76.4: *Sending a consignment – Step 5.*

STEP 6: Additionally, attachments can be added to any consignment. This is done using the paperclip icon at the bottom of the panel. After clicking it, a window will appear where you must select the file to be attached.

NOTE: Keep in mind that the attachment must meet the following criteria:

- it must be within the limit of *up to 25 files*;
- *attachments should not have the same content (even if they have different names)*.
- the attachment's character encoding should be UTF-8;

The message will also list the allowed file extensions and guidelines for the attachment name.

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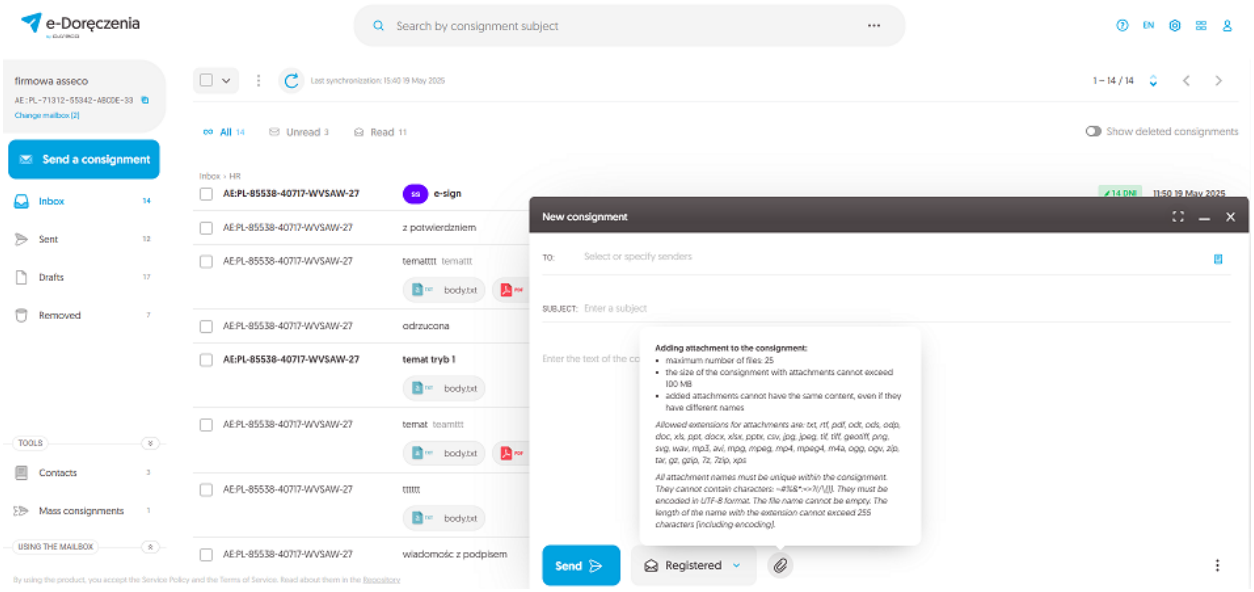

Figure 76.5: ***Sending a consignment – Step 6.***

STEP 7: Select the file that will be attached to the consignment. Remember that the attachment must meet the criteria mentioned above.

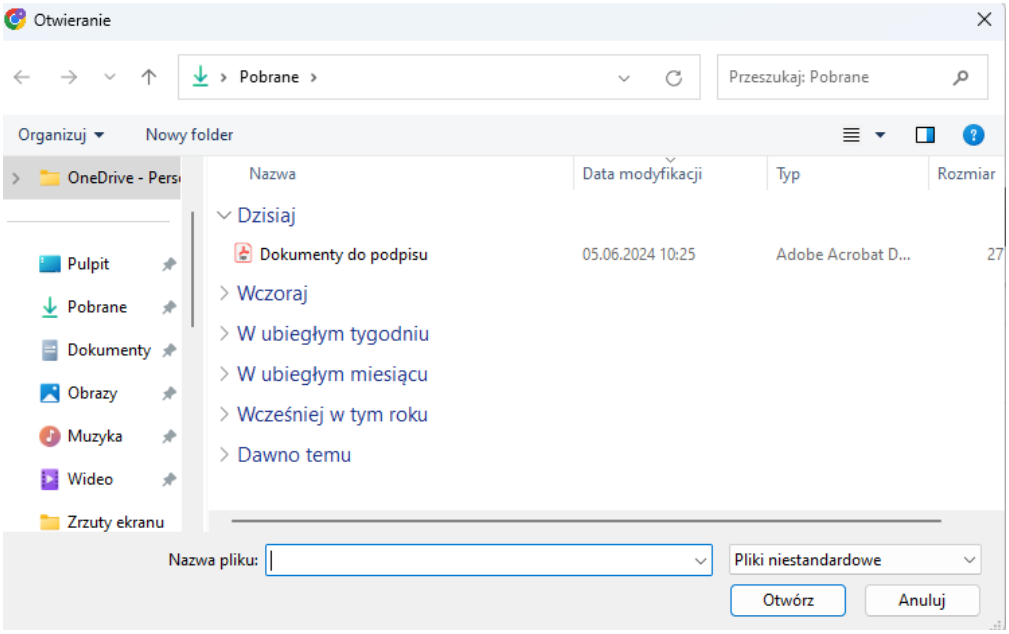

Figure 76.6: ***Sending a consignment – Step 7.***

Make sure that the attached file is saved with UTF-8 encoding. Otherwise, when rendering the preview, Polish characters may display incorrectly.

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Example: preview of a file saved with ANSI encoding.

STEP 8: After selecting the file, it will be added as an attachment.

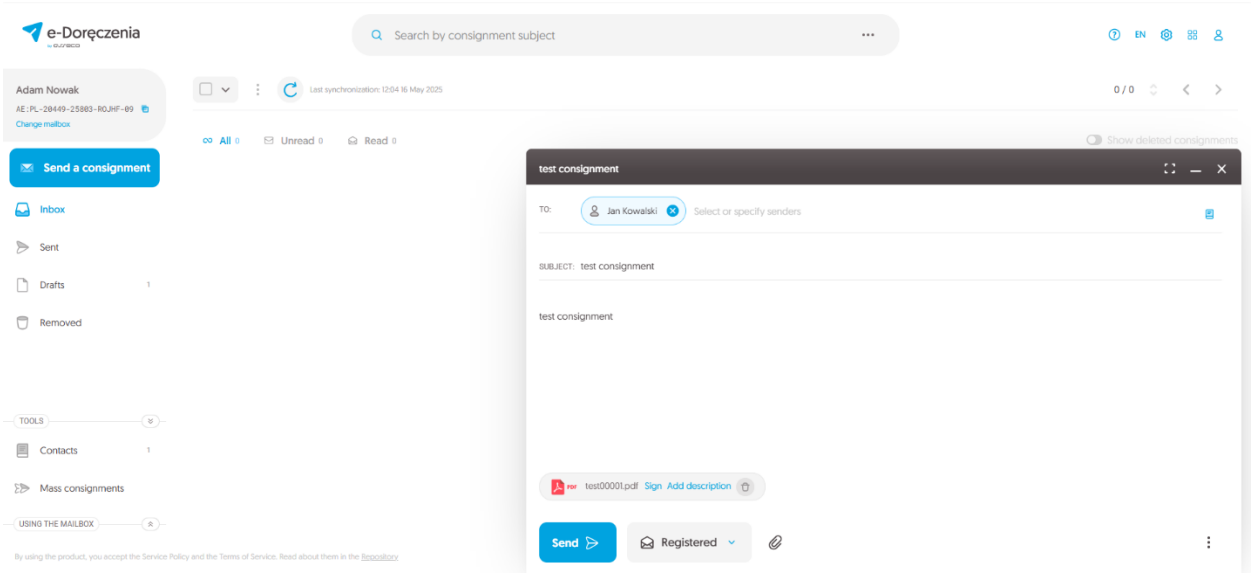

Figure 76.8: ***Sending a consignment – Step 8.***

STEP 9: A text description can be added to each attachment. To do this, select the "***Add Description***" option located next to the attached file name. After selecting this option, a panel will appear allowing you to enter a description.

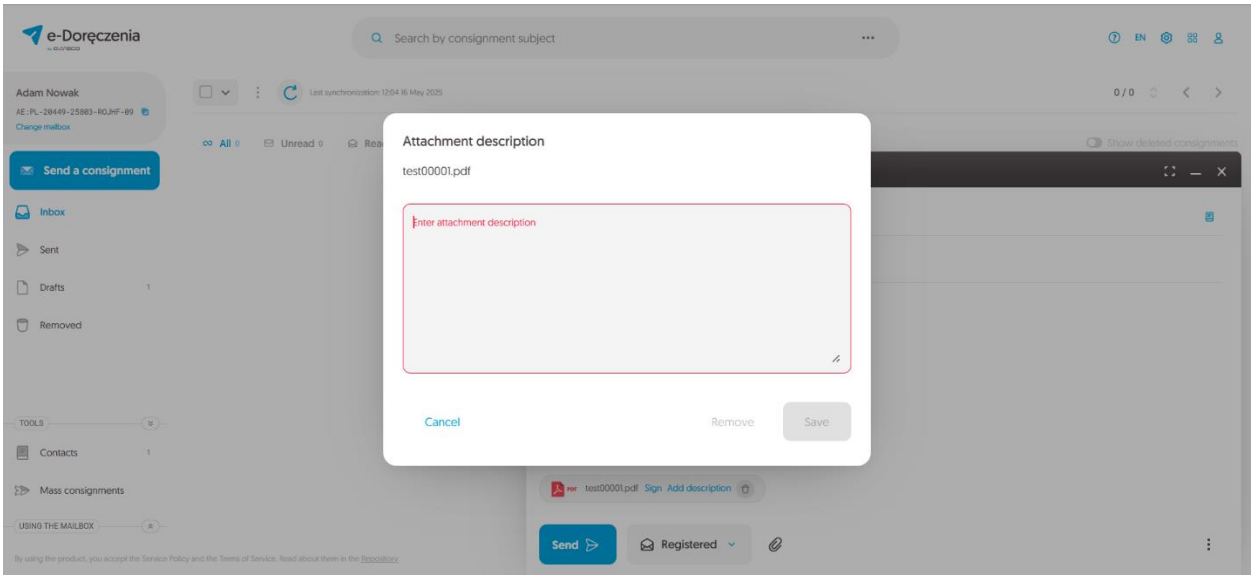

Figure 76.9: ***Sending a consignment – Step 9.***

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STEP 10: After adding the description, select the "***Save***" option to confirm it. The description will appear next to the name of the added attachment.

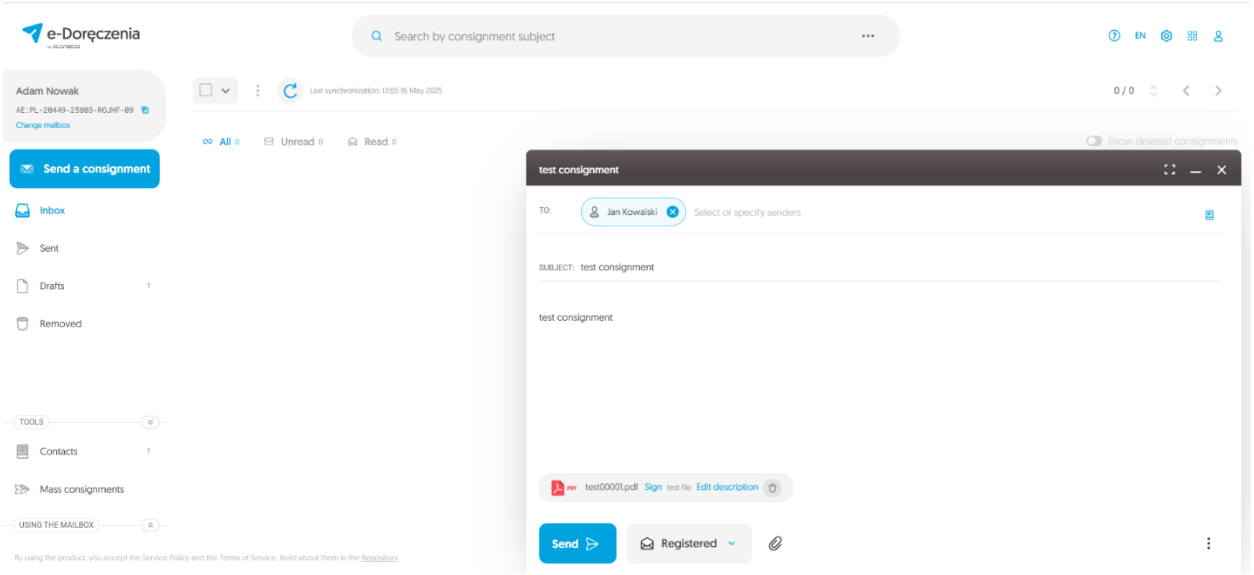

Figure 76.10: ***Sending a consignment – Step 10.***

STEP 11: Attachments can also be electronically signed. To do this, use the "***Sign***" option. Selecting it will start the digital signing process. You must choose the type of qualified signature that should be used to sign the attachments.

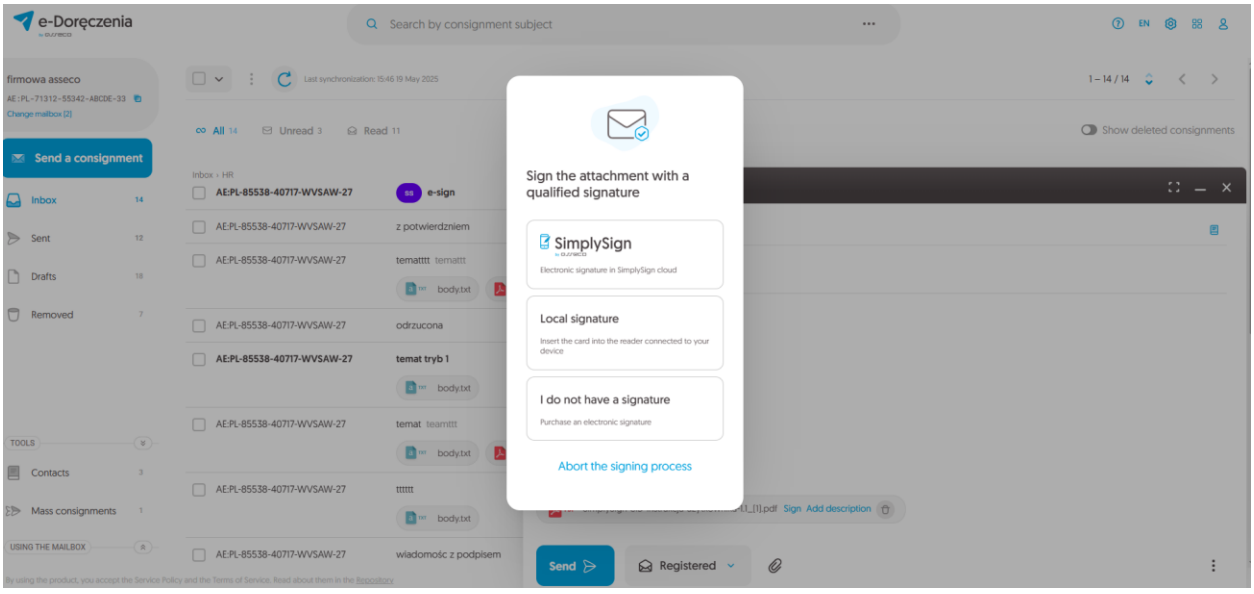

Figure 76.11: ***Sending a consignment – Step 11.***

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STEP 12: An added attachment can be removed using the "***Removed***" option. A window will appear asking "***Are you sure you want to remove the selected attachment?***". Depending on your intention, select either "***Cancel***" or ,"***Remove***".

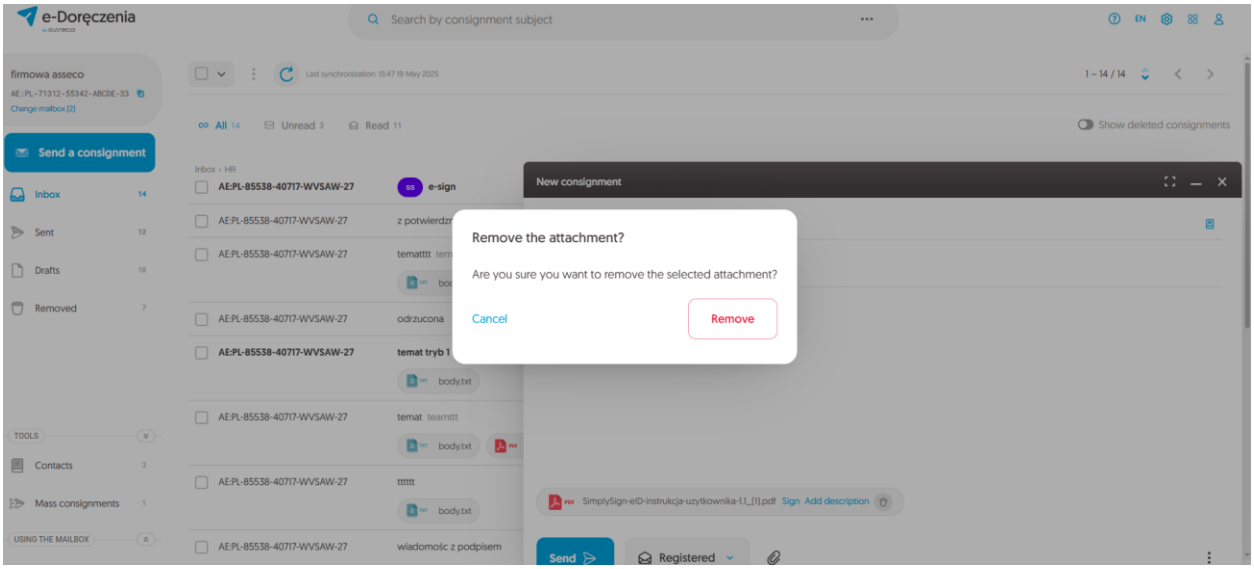

Figure 76.12: ***Sending a consignment – Step 12.***

Delivery method

STEP 13: The final stage of sending a consignment is choosing the delivery method. This is done using the dropdown list located at the bottom right of the panel.

Delivery methods:

- "*Registered" – default mode*,
- "*Registered with confirmation*",
- *"Registered with e – signature"*.

The selected option will be highlighted, and the information about the chosen mode will appear in the bottom section of the window.

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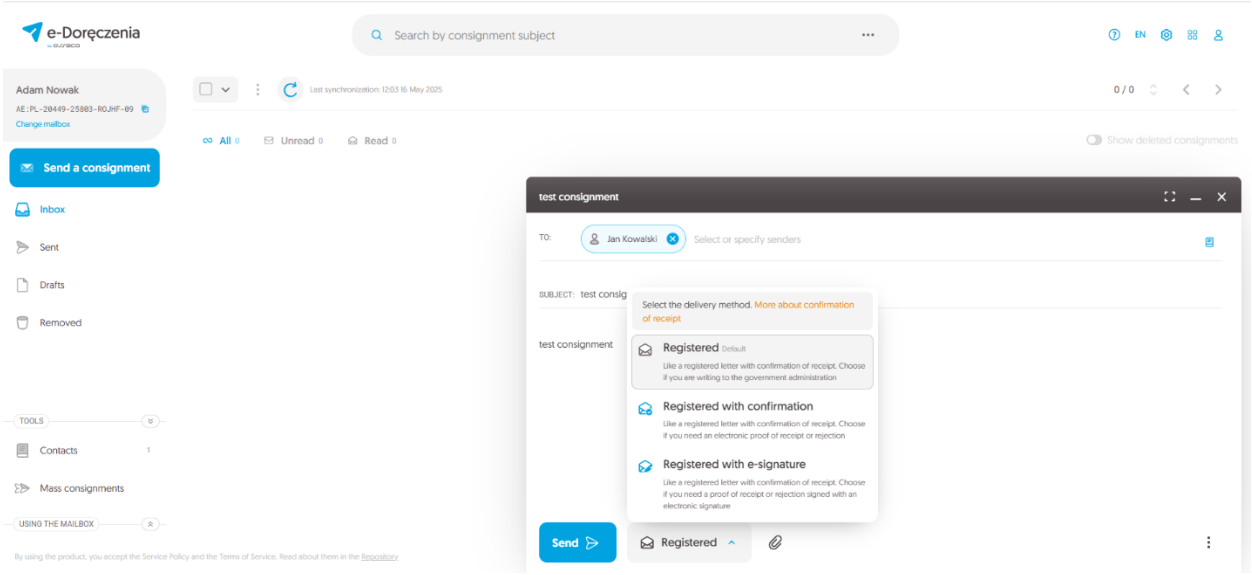

Figure 76.12: ***Sending a consignment – Step 13.***

STEP 14: After selecting the delivery method and clicking the "***Send***" option, the mail will be sent to the recipient. A confirmation message will appear at the bottom of the page.

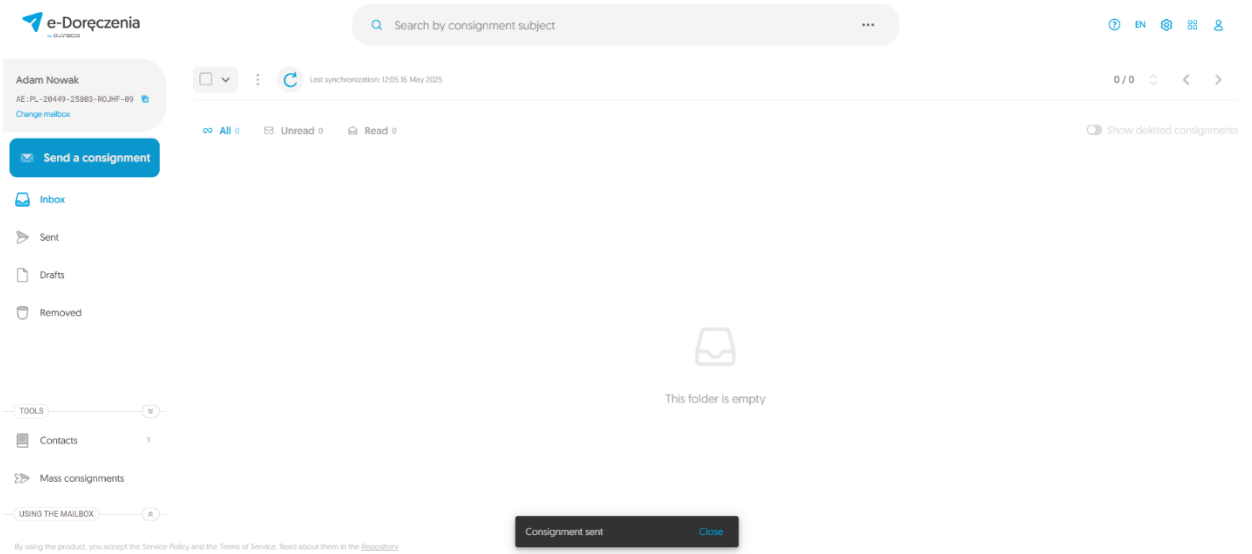

Figure 76.13: ***Sending a consignment – Step 14.***

If the User attempts to send a consignment without content, an appropriate notification will appear: "***Enter the text of the consignment***". Sending a consignment without content is not possible in the e-Delivery service.

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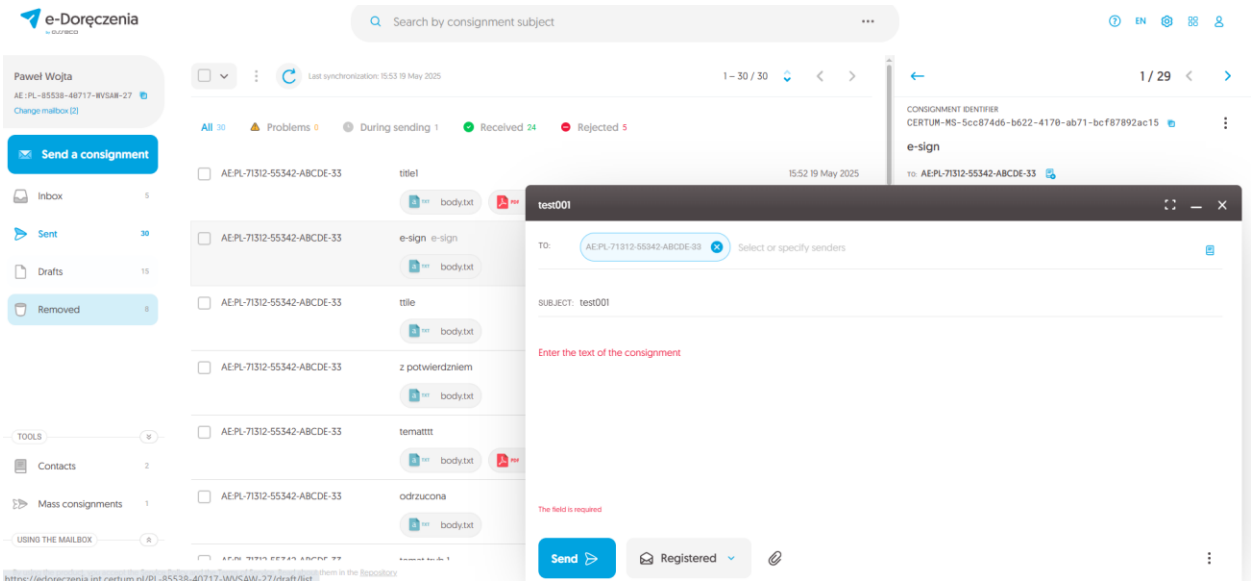

Figure 77: ***Sending a consignment without Content.***

8.2.1 "*Sent*" folder.

After navigating to the "***Sent***" folder, all consignments sent from the active mailbox will be displayed.

Using the buttons located above the list of consignments, you can filter the items according to the following categories:

- "*All*";
- "*Problems*";
- "*During sending*";
- "*Received*";
- "*Rejected*".

When a consignment is selected from the list, its details will be displayed.

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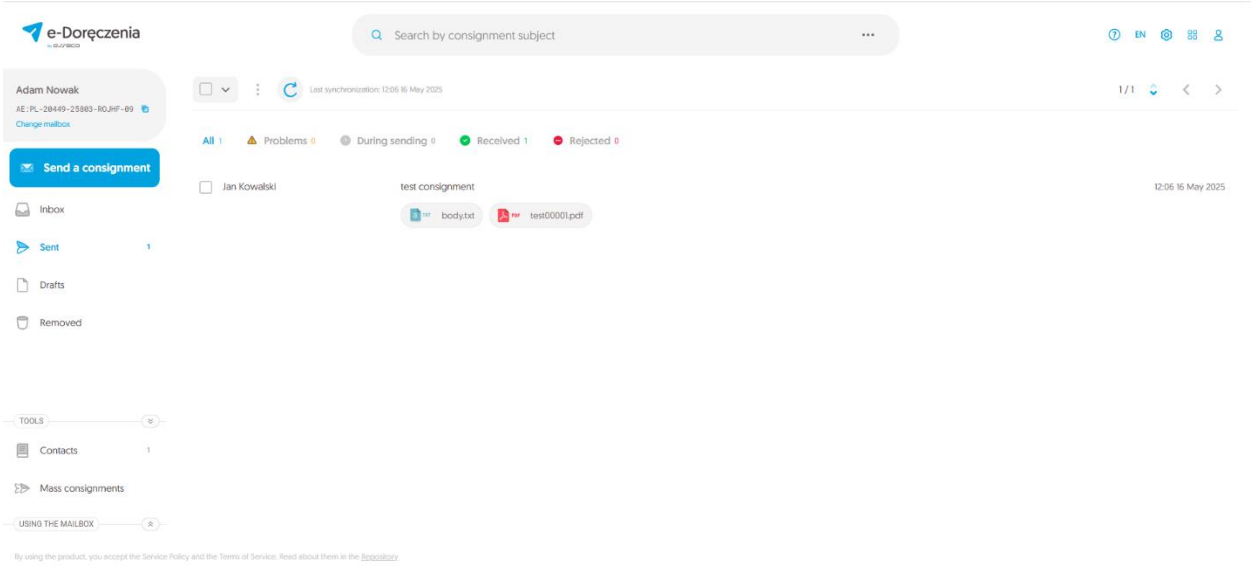

Figure 78: *Consignment sent*.

8.2.2 Actions related to consignments sent

"*Add or remove labels*"

Adding labels to consignments in the "***Sent***" folder is done the same way as in the "***Inbox***" folder. To start the process of adding or removing a label, select the "***Add or remove labels***" option and tag the mail with the previously created label. This option is described in more detail in earlier chapters.

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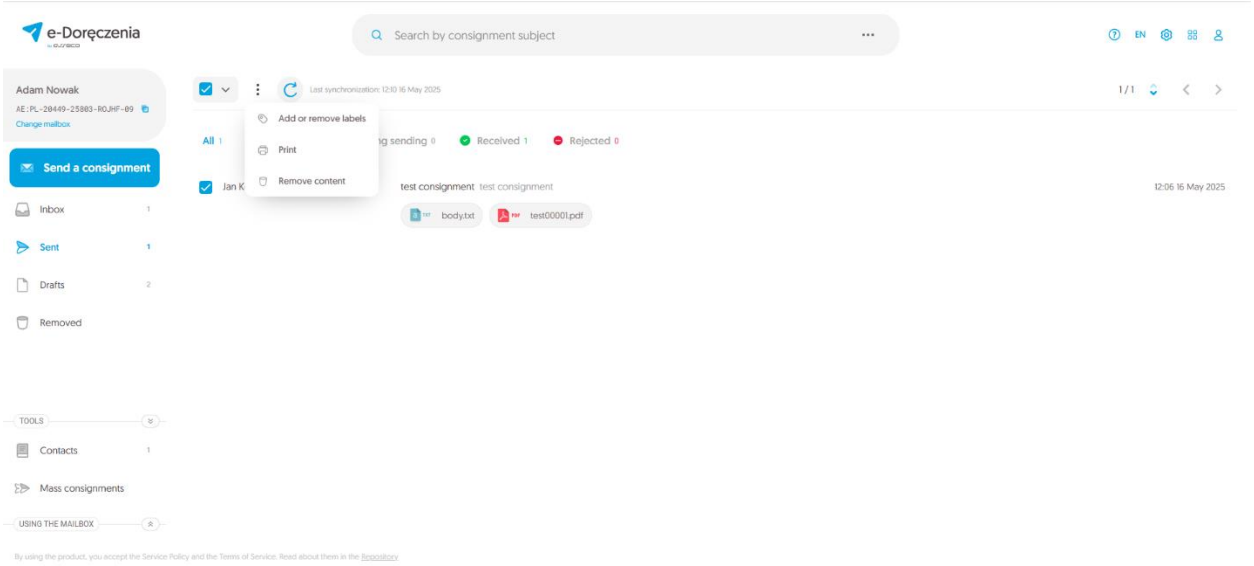

Figure 79: ***Adding or removing a label to/from a sent consignment.***

"*Print*"

Selecting this option allows you to print the content of a given consignment. Printing consignments in the "***Sent***" folder works the same way as in the "***Inbox***" folder. To start the process of adding or removing a label, select "***Print***" option. You can then print the message as you would print a standard document, or save the message content to your device as a PDF file. This option is described in more detail in earlier chapters.

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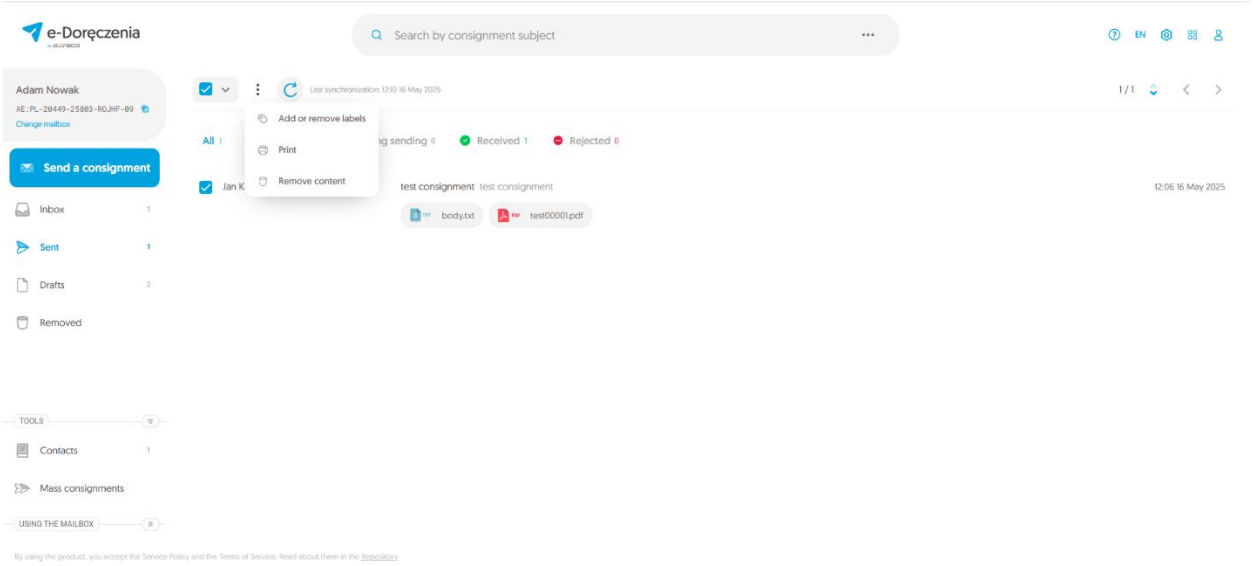

Figure 80: ***Printing a Sent consignment.***

"*Remove content*"

Selecting this option will move the selected consignment to the "***Removed***" folder. This option in the "***Sent***" folder operates the same as it does in the "***Inbox***" folder. This option is described in more detail in earlier chapters.

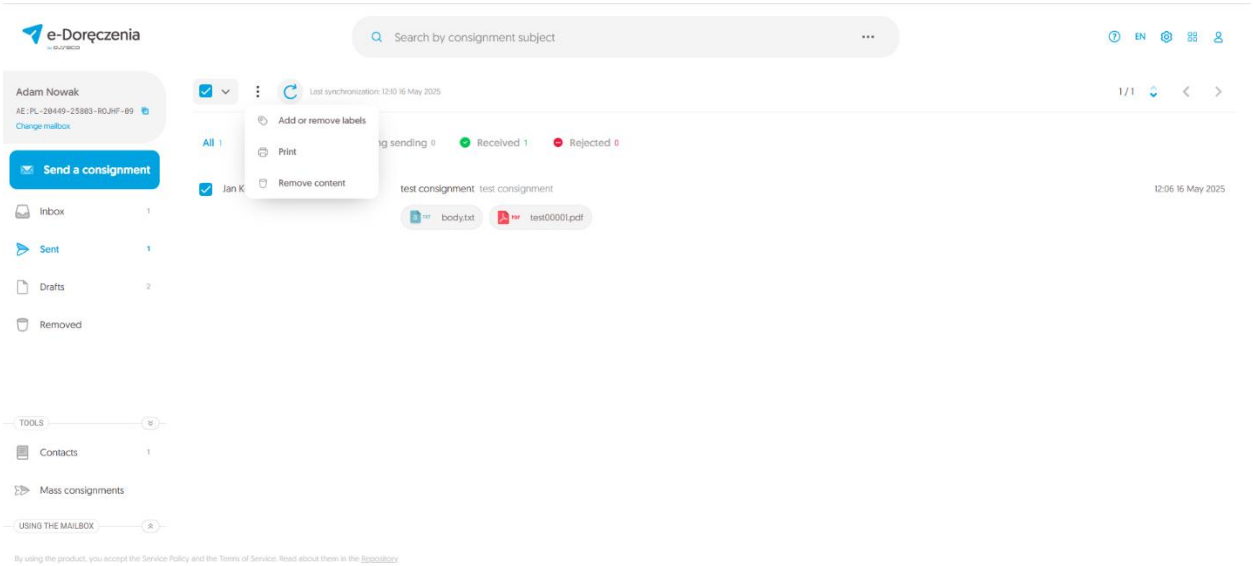

Figure 81: ***Deleting a sent consignment.***

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8.3 Action III: *Drafts*

A consignment can be saved for later sending. To do this, in the mail creation mode, select the "***Save***" option. To save the consignment, at least the subject must be entered.

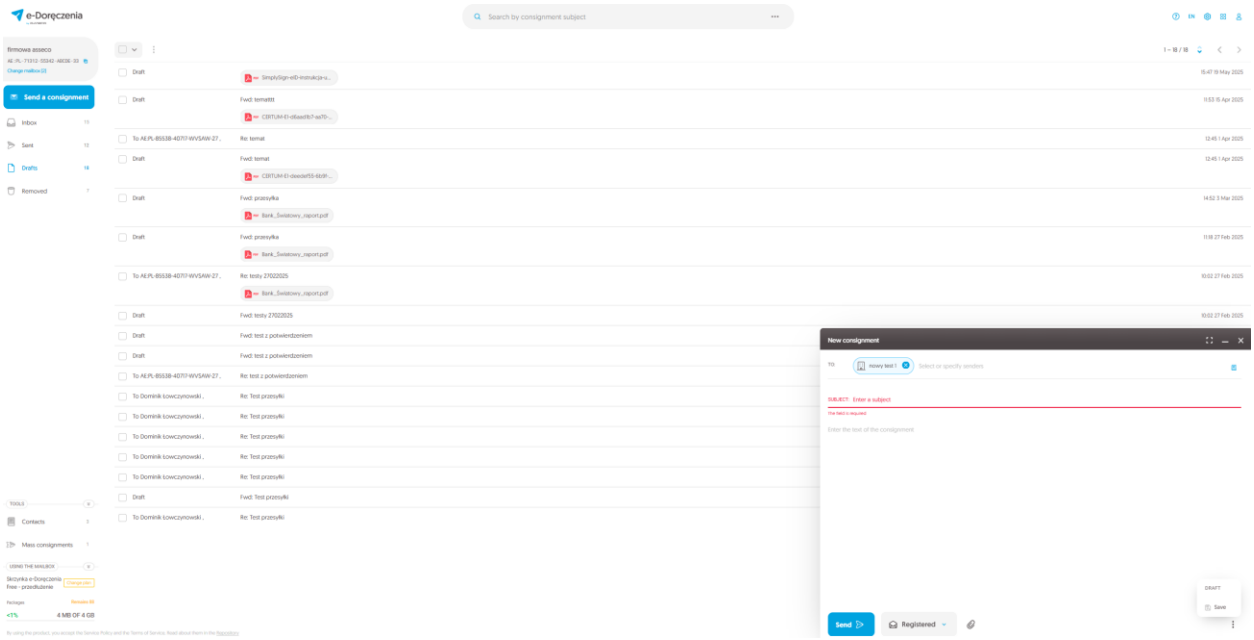

Figure 82: *Consignment Content Editor.*

The saved consignment l can be later found in the "***Drafts***" folder. Upon opening the draft, you can also see the time it was saved. From this view, you can continue editing the message, send it using the "***Send***", save it again after editing using the "***Save***" option or remove it by selecting the "*Trash bin*" icon.

certum.pl
infolinia@certum.pl

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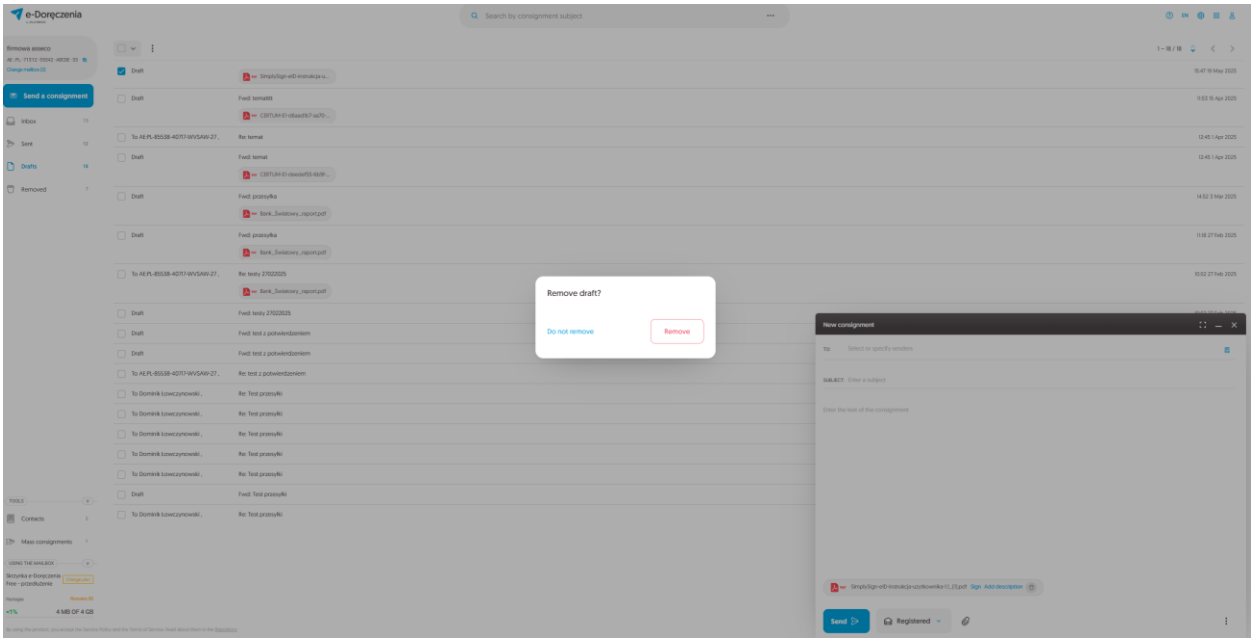

Figure 83: ***Removing a consignment Draft.***

8.4 Action IV: Removing consignments

After navigating to the "***Removed***" folder, you gain access to the "*digital envelopes*" and "digital delivery *notices*" that remain after the content of a consignment has been removed. This topic is described in more detail in earlier chapters.

NOTE:

Removed consignments retain only the evidence and metadata related to the selected consignment. They do not contain the actual content of the consignment.

By selecting a consignment, you can access the metadata and evidence related to it.

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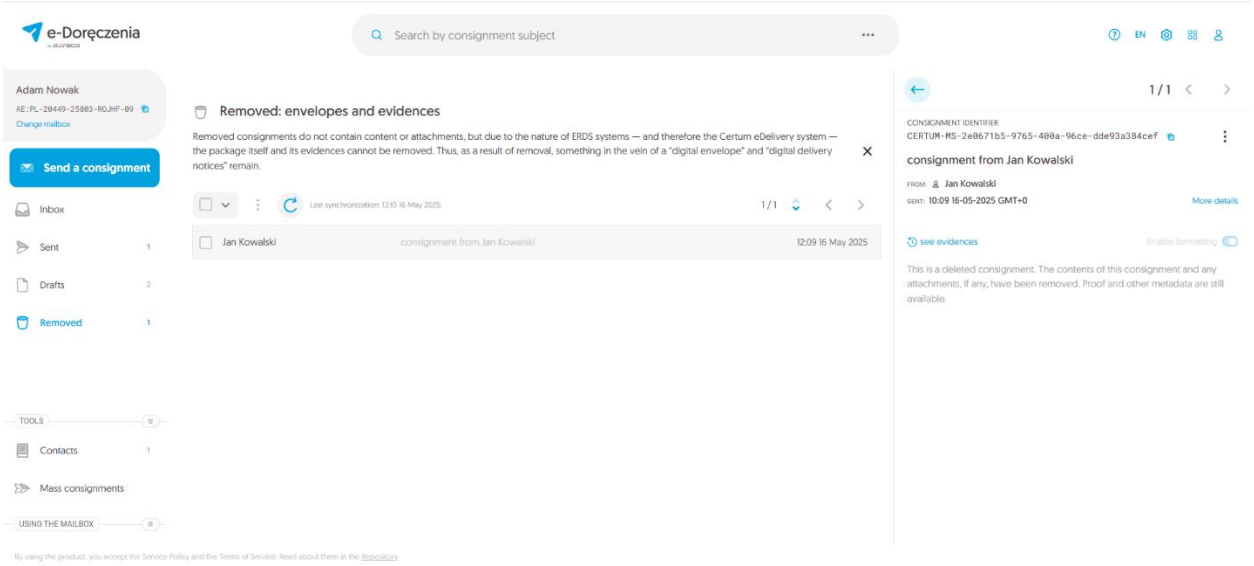

Figure 84: ***Folder – "Removed".***

8.5 Action V: Exceeding mailbox capacity

The size of each sent and received consignment contributes to the total usage of mailbox space, which can lead to exceeding the subscribed mailbox limit.

To prevent this, the system notifies the user about mailbox space usage through messages on the homepage and notifications sent to the e-mail:

>> notification about nearing the mailbox limit

>> message about reaching the mailbox limit

ATTENTION!

Exceeding the maximum capacity will make it impossible to send or receive consignments from non-public entities.

Consignments received (from any sender) that do not cause the mailbox to exceed capacity are treated as **subscription consignments**.

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If a consignment from a non-public sender causes the mailbox to exceed its capacity, it will still be received. Such a mail will have a retention period set according to the service configuration (e.g., 30 days), regardless of the current mailbox subscription. These are referred to as **over-subscription** consignments.

If a consignment (from a sender that is a public institution) causes the mailbox to exceed its capacity, it will still be received and treated as a **subscription** consignments.

The retention period of over-subscription consignments can be changed to the subscription period after freeing up space in the mailbox. This change must be made by the user.

Mailbox space can be freed by upgrading to a higher subscription plan and/or deleting existing consignments from the mailbox.

9 Consignment Finder

Both received, sent, and removed consignments can be searched. This is done using the search panel located at the top of the page. By default, the search is performed within the subject of the consignment.

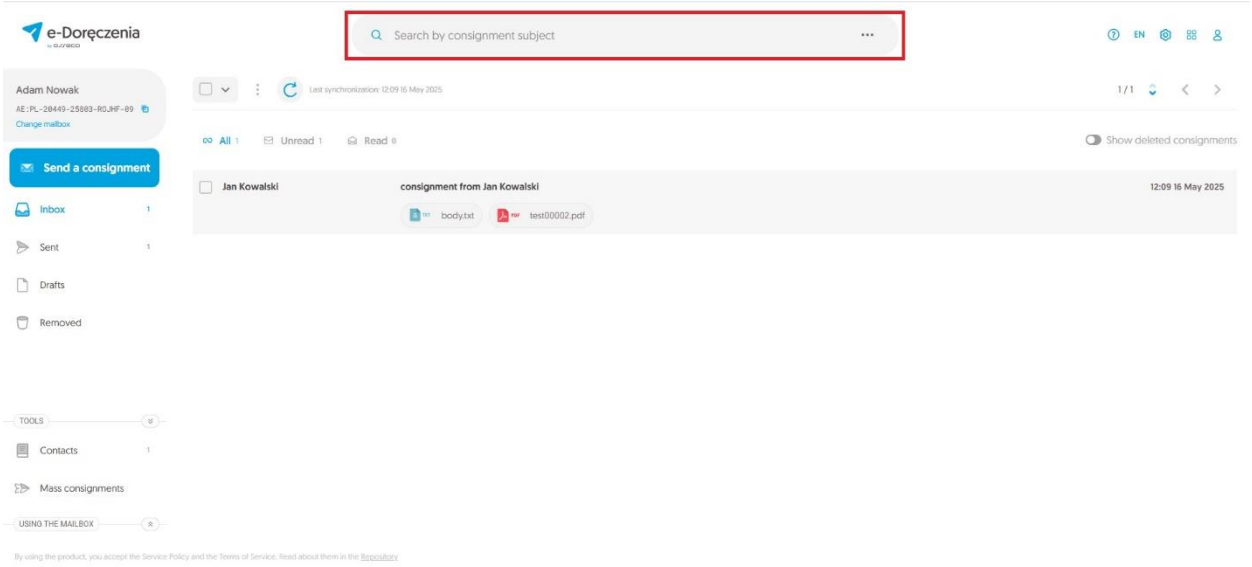

Figure 85: ***Global consignment finder.***

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Consignments can be searched using either basic or advanced methods. The basic method involves entering keywords into the search panel. The advanced method involves enabling the advanced search option and defining specific search criteria. The next two subsections present both search methods.

9.1 Basic search

STEP 1: To use basic search, simply type keywords into the search panel and press Enter.

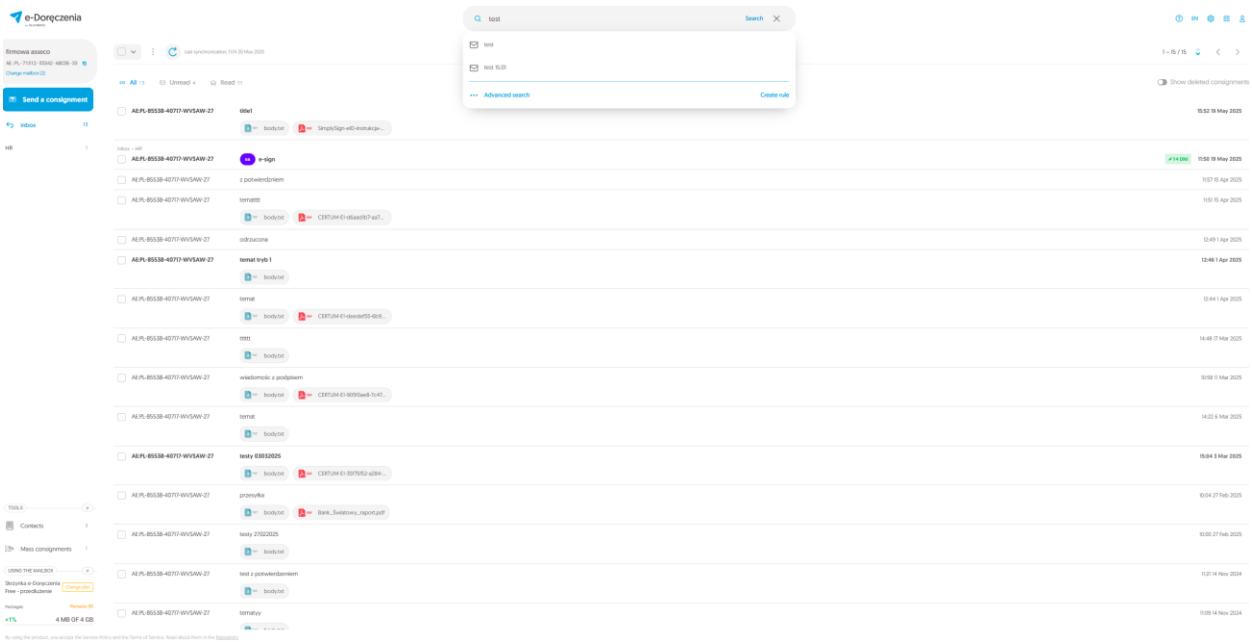

Figure 86: ***Basic consignment search – Step 1.***

STEP 2: The list of consignments will be filtered to display only the matching results.

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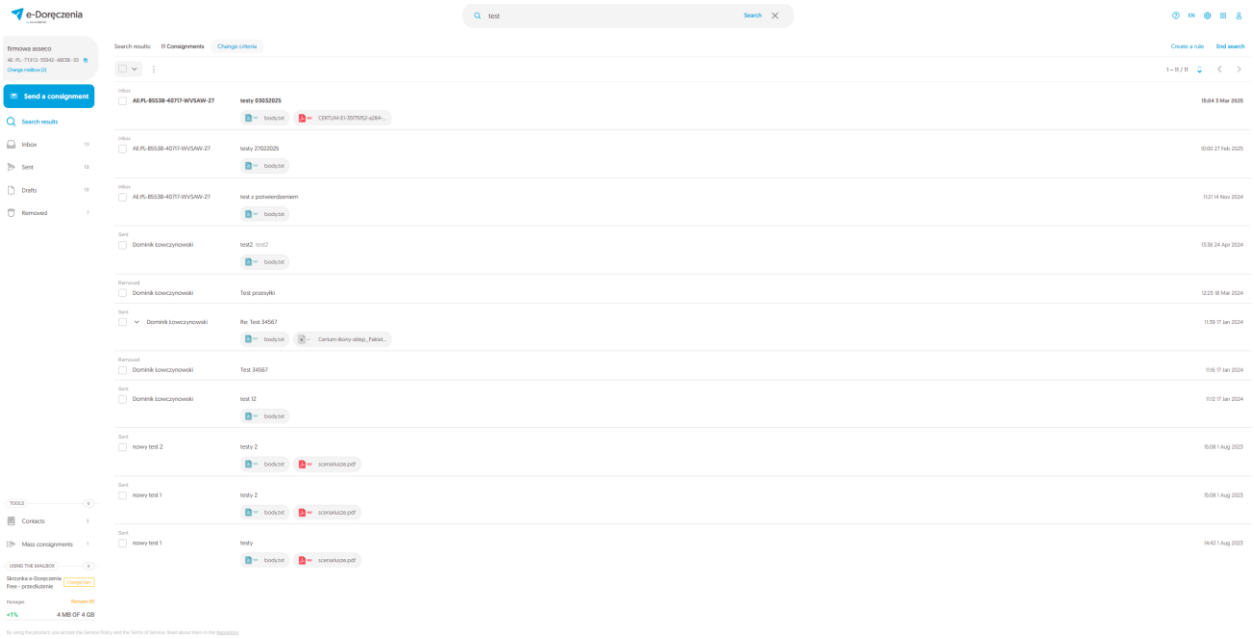

Figure 87.1: ***Basic consignment search – Step 2.***

9.2 Advanced search

STEP 1: To use the advanced search option, activate the search panel and select "***Advanced search***".

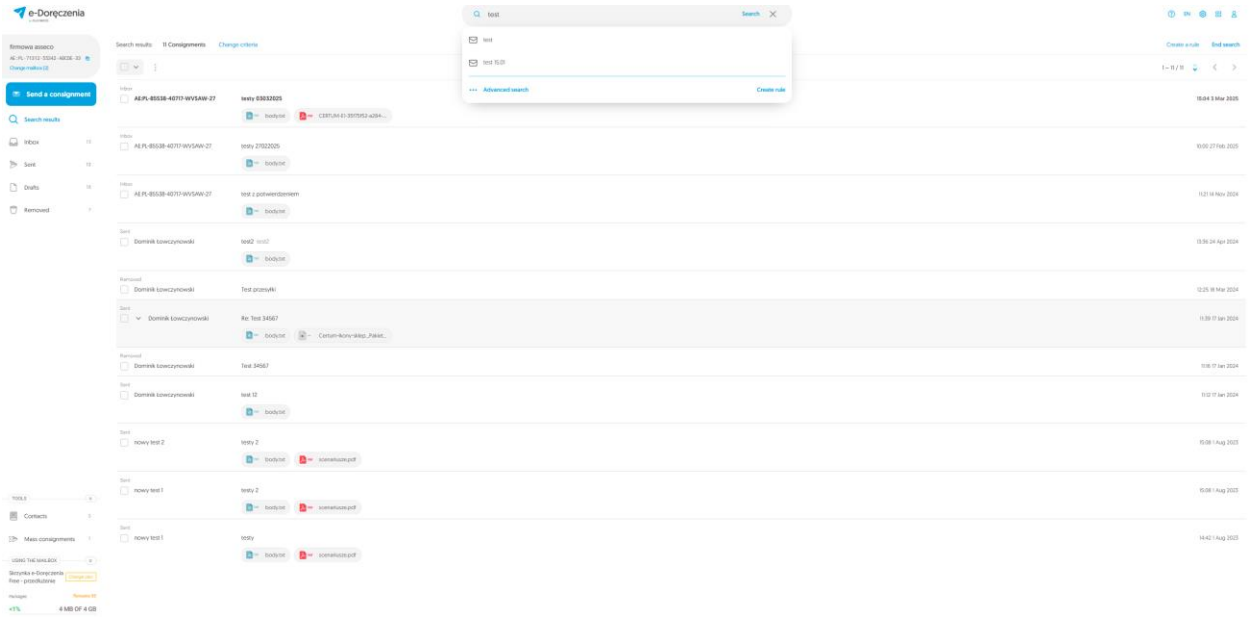

Figure 88: ***Advanced Mail Search – Step 1.***

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STEP 2: After selecting the "***Advanced search***", a panel will appear allowing you to define the following search criteria:

- "*Subject*";
- "*ID*";
- "*Sender*";
- "*Recipient*";
- "*Date sent*";
- "*Date received*";
- *“Labels”*;
- *“Folders”*;
- "*Type of proofs*";
- "*Date of proofs creation*";
- "*File size*";
- *"Consignments"* – refers to in subscription/over-subscription consignments.

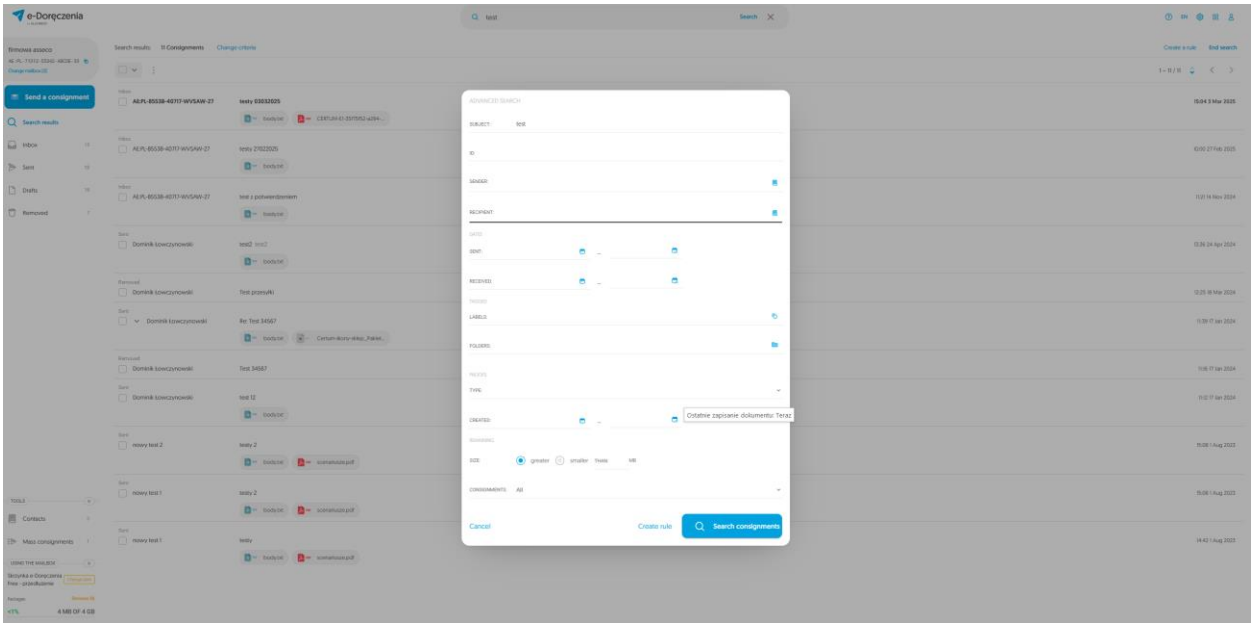

Figure 88.1: ***Advanced Mail Search – Step 2.***

STEP 3: Below is an example in which messages with the subject "***test***" have been searched.

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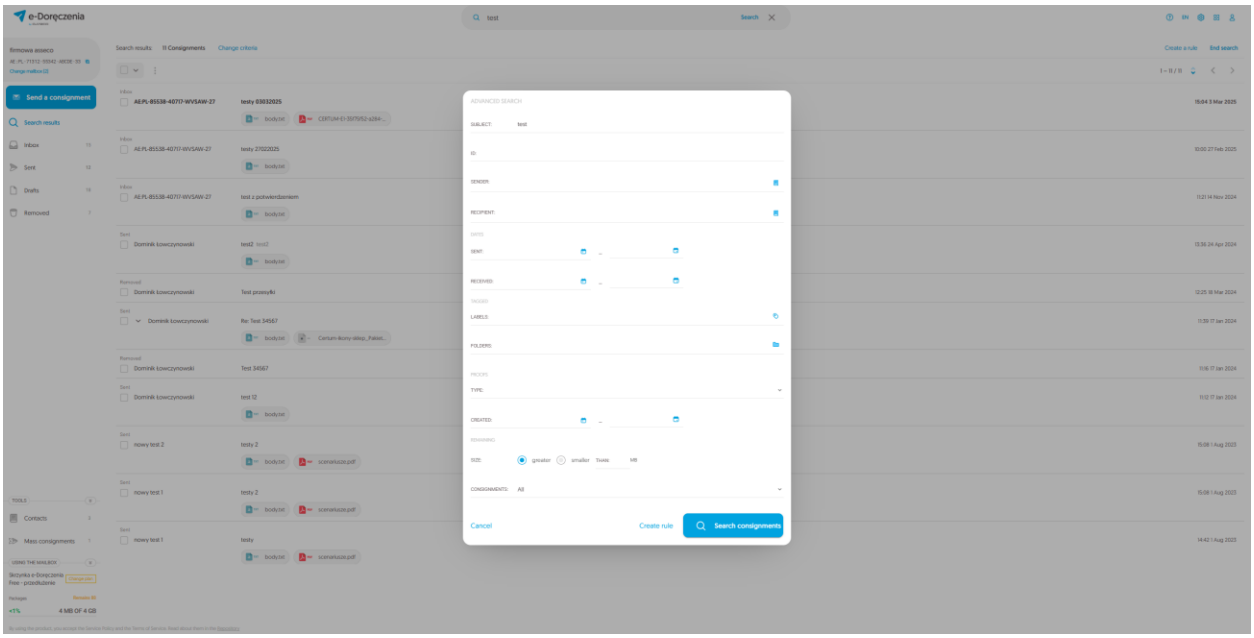

Figure 88.2: ***Advanced consignment search – Step 3.***

STEP 4: After defining the search criteria and selecting "***Search consignments***," the system will search the consignment list. The list will be limited to consignments that meet the selected search criteria.

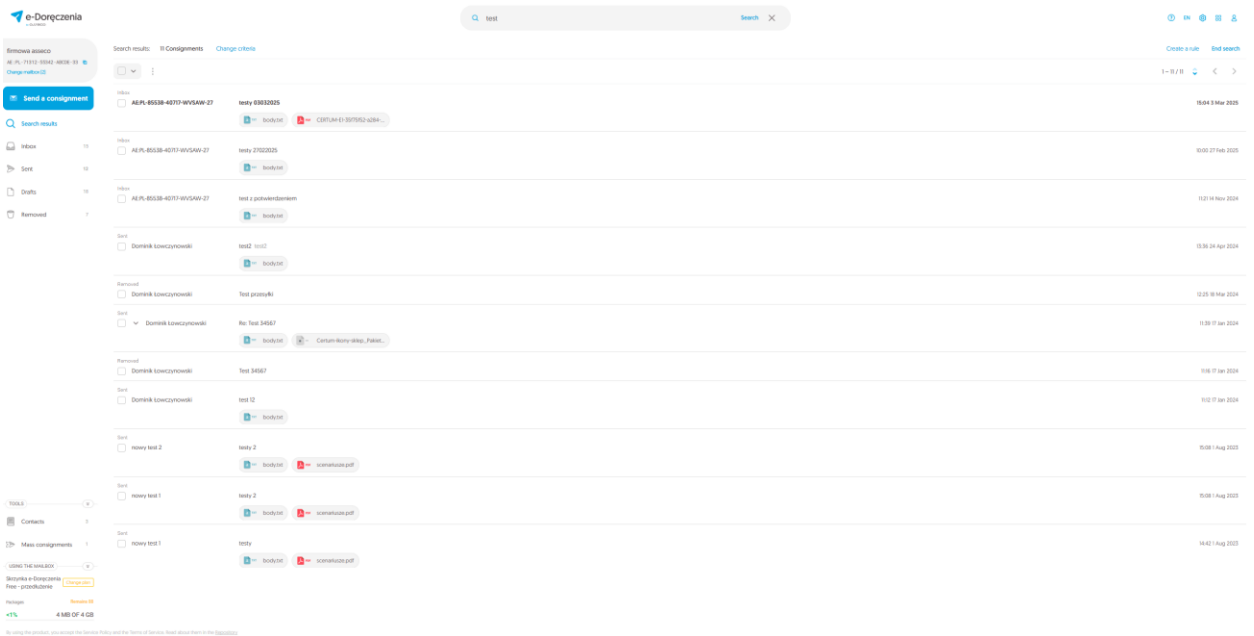

Figure 88.3: ***Advanced consignment search – Step 4.***

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Based on the search results, you can create rules, as described in Section 6.6. To do this, first perform a search, then use the "***Create rule***" option located on the right side above the search results.

10. Invitations and authorizations

10.1 Rules for inviting and authorizing users

It is possible to invite or authorize other Users to operate the mailbox.

NOTE

>> Inviting a user to operate a mailbox prevents later changing their role to that of an authorized user.

>> Authorizing a user to operate a mailbox prevents later changing their role to that of an invited user.

The following rules apply:

- An invited person uses the mailbox under the name or first name of the mailbox owner.
- An invited person does not need to have an account in the e-Delivery service.
- An invited person can be assigned one of the following roles:
  - "*Invited user*";
  - "*Invited User (read-only)*".
- An authorized person uses the mailbox under their own name.
- An authorized person must have an account in the e-Delivery service.
- An authorized person can be assigned one of the following access levels:
  - "*Authorized administrator*";
  - "*Authorized administrator (read-only)*";
  - "*Authorized user*";
  - "*Authorized user (read-only*".

10.1.1 Access and permissions levels: Invited and authorized users

Below are the basic access levels and associated permissions for Invited and Authorized Users:

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Invited User:

- Acts with the Owner’s permission, using the Owner’s name, but in all evidence, personal data is replaced with the Owner’s data.
- Has all permissions related to incoming/outgoing consignments and associated evidence.
- Can generate mailbox usage reports.
- Can manage contacts.
- Can manage rules.
- Can manage folders.
- Can manage labels.
- Does not have the permission to manage other roles: delete invitations, change roles, suspend/reactivate.

User invited in read-only mode:

- Acts with the Owner’s permission, using the Owner’s name, but in all evidence, personal data is replaced with the Owner’s data.
- Has read-only access to incoming/outgoing consignments and evidence.
- Can generate mailbox usage reports.
- Cannot manage contacts.
- Cannot manage the rules.
- Cannot manage folders.
- Cannot manage labels.
- Does not have the permission to manage other roles: delete invitations, change roles, suspend/reactivate.

Authorized user:

- Acts on behalf of the Owner under their own name, which means that the authorized user's data will appear in evidence.
- Has all permissions related to incoming/outgoing consignments and associated evidence.
- Can generate reports.
- Can removed consignments.
- Can manage contacts.
- Can manage rules.
- Can manage folders.
- Can manage labels.

- Does not have the permission to manage other roles: delete invitations, change roles, suspend/reactivate.

User authorized in read-only mode:

- Acts on behalf of the Owner under their own name, which means that the authorized user's data will appear in evidence.
- Has read-only access to incoming/outgoing consignments and evidence.
- Can generate reports.
- Cannot manage contacts.
- Cannot manage the rules.
- Cannot manage folders.
- Cannot manage labels.
- Does not have the permission to manage other roles: delete invitations, change roles, suspend/reactivate.

Authorized administrator:

- Acts on behalf of the Owner under their own name, which means that the authorized user's data will appear in evidence.
- Has all permissions related to incoming/outgoing consignments and associated evidence.
- Can generate reports.
- Can removed consignments.
- Can manage contacts.
- Can manage rules.
- Can manage folders.
- Can manage labels.
- Can manage other roles within the following scope:
    - send an invitation to authorize a user for the role of authorized user (unconfirmed) and authorized read-only user (unconfirmed), as well as send an invitation for the role of invited user (unconfirmed) and invited read-only user (unconfirmed),
    - can delete the above-mentioned invitations,
    - can change the role of users: authorized user and authorized read-only user to another among these roles,
    - can change the role of users: invited user and invited read-only user to another among these roles,
    - can suspend/reactivate the roles of authorized users and read-only authorized users as well as invited users and invited read-only users,

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- cannot add additional authorized administrators or authorized read-only administrators to the mailbox on whose behalf they are acting.

Administrator authorized in read-only mode:

- Acts on behalf of the Owner, but under their own name, which means that the authorized user's data will appear in the evidence.
- Has read-only access to incoming/outgoing consignments and evidence.
- Can generate reports.
- Cannot manage contacts.
- Cannot manage the rules.
- Cannot manage folders.
- Cannot manage labels.
- Does not have the permission to manage other roles: delete invitations, change roles, suspend/reactivate.

10.2 Actions related to inviting other users

10.2.1 Inviting a user

STEP 1: To invite another User to access their mailbox, the User must go to the "***Settings***" option, then to the "***Users***" tab, and navigate to section "***Invitations and authorizations***".

To send an invitation to operate mailbox, select the "***New person***" option.

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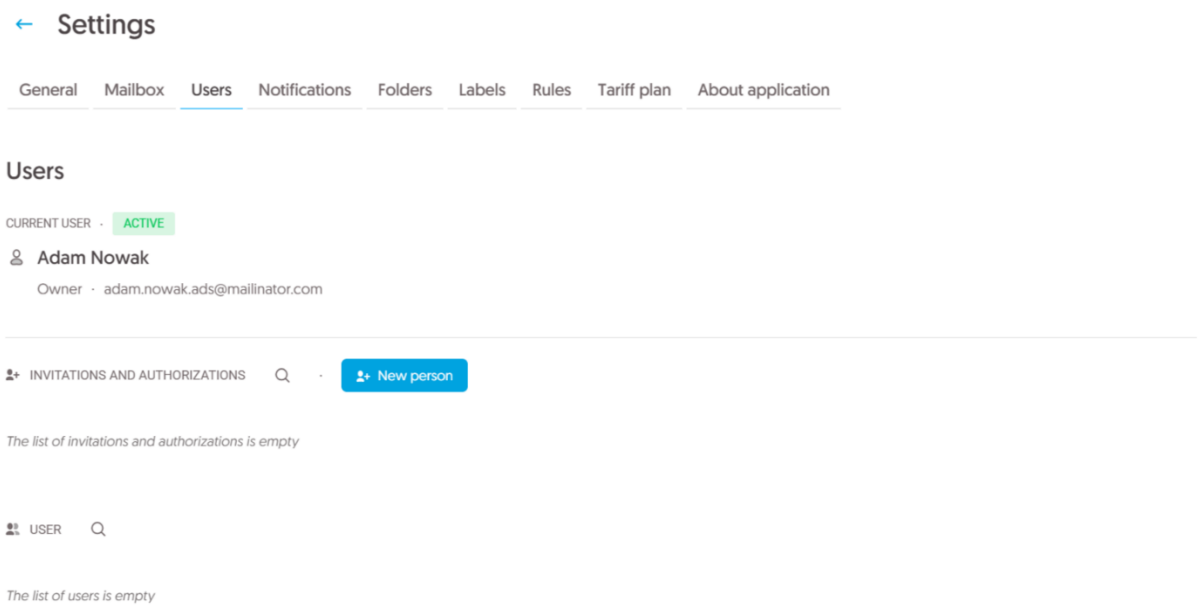

Figure 89 ***Inviting a User - Step 1.***

STEP 2: A form will appear allowing the User to send an invitation or grant authorization to access the mailbox.

Then define the following parameters one by one:

- Email address of the Invited User
- Role of the Invited User – options:
  - Invited user
  - Invited user (read)

Select the "***Invite***" tab, as shown in the illustration below. In the displayed window, enter the details of the User being invited.

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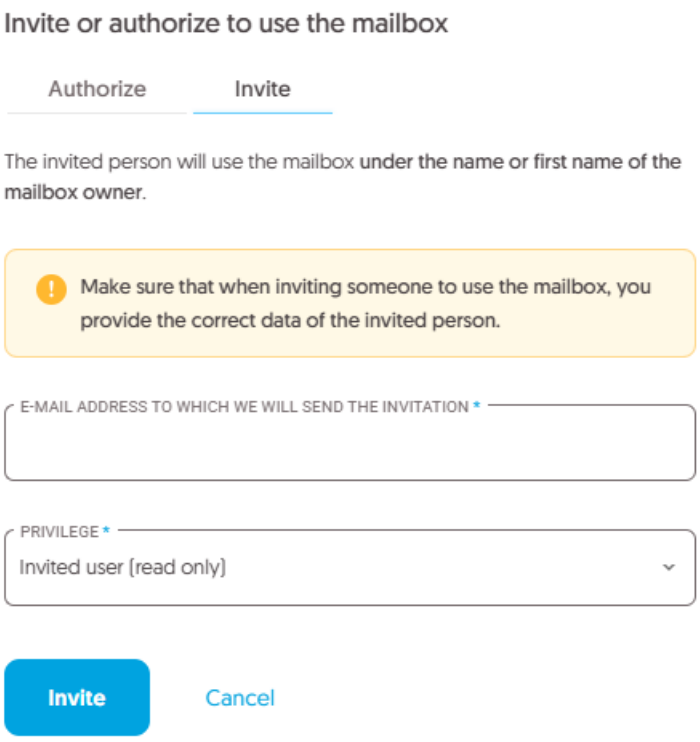

Figure 89.1: ***Inviting a User - Step 2.***

STEP 3: In the "***Invitations and authorizations***" section, you can find the invitation that was sent in the previous step.

10.2.2 Acceptance of invitation by the invited user

STEP 1: An email notification will be sent to the email address of the Invited User, informing them of the invitation to operate the User's mailbox. The email will contain a password for logging into the e-Delivery system.

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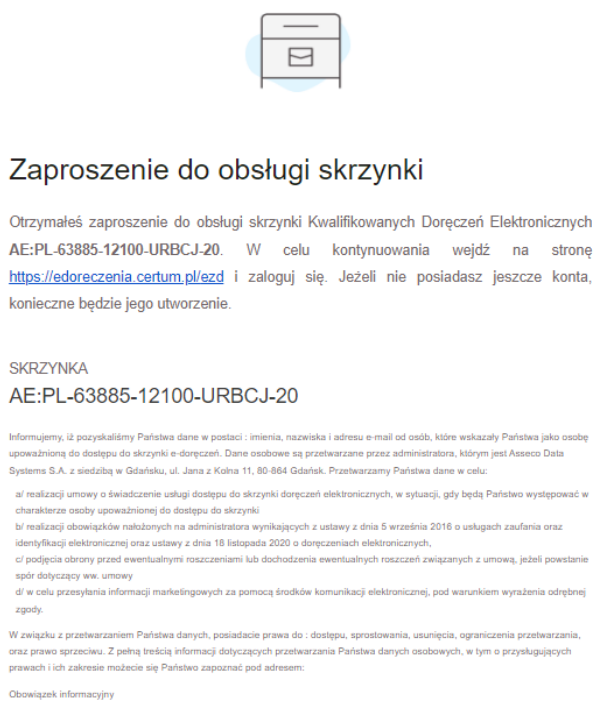

Zaproszenie do obsługi skrzynki

Otrzymałeś zaproszenie do obsługi skrzynki Kwalifikowanych Doręczeń Elektronicznych **AE:PL-63885-12100-URBCJ-20**. W celu kontynuowania wejdź na stronę https://edoreczenia.certum.pl/ezd i zaloguj się. Jeżeli nie posiadasz jeszcze konta, konieczne będzie jego utworzenie.

SKRZYNKA
AE:PL-63885-12100-URBCJ-20

Informujemy, iż pozyskaliśmy Państwa dane w postaci : imienia, nazwiska i adresu e-mail od osób, które wskazały Państwa jako osobę upoważnioną do dostępu do skrzynki e-doręczeń. Dane osobowe są przetwarzane przez administratora, którym jest Asseco Data Systems S.A. z siedzibą w Gdańsku, ul. Jana z Kolna 11, 80-864 Gdańsk. Przetwarzamy Państwa dane w celu:

a/ realizacji umowy o świadczenie usługi dostępu do skrzynki doręczeń elektronicznych, w sytuacji, gdy będą Państwo występować w charakterze osoby upoważnionej do dostępu do skrzynki
b/ realizacji obowiązków nałożonych na administratora wynikających z ustawy z dnia 5 września 2016 o usługach zaufania oraz identyfikacji elektronicznej oraz ustawy z dnia 18 listopada 2020 o doręczeniach elektronicznych,
c/ podjęcia obrony przed ewentualnymi roszczeniami lub dochodzenia ewentualnych roszczeń związanych z umową, jeżeli powstanie spór dotyczący ww. umowy
d/ w celu przesyłania informacji marketingowych za pomocą środków komunikacji elektronicznej, pod warunkiem wyrażenia odrębnej zgody.

W związku z przetwarzaniem Państwa danych, posiadacie prawa do : dostępu, sprostowania, usunięcia, ograniczenia przetwarzania, oraz prawo sprzeciwu. Z pełną treścią informacji dotyczących przetwarzania Państwa danych osobowych, w tym o przysługujących prawach i ich zakresie możecie się Państwo zapoznać pod adresem:

Obowiązek informacyjny

Figure 82: ***Acceptance of Invitation – Step 1.***

STEP 2: After receiving an invitation, the Invited User must log in to the system. During the first login, after entering the correct login and password, the system will require the User to set a new password.

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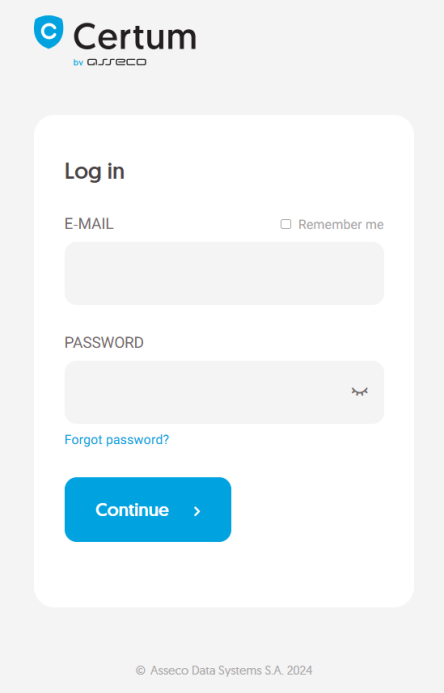

Figure 82.1: ***Acceptance of Invitation – Step 2.***

STEP 3: Once the new password is set, the Invited User will be given the option to accept or reject the invitation.

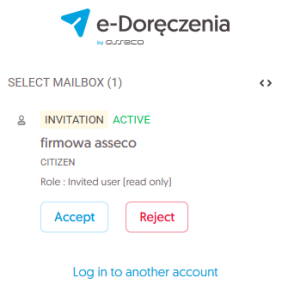

Figure 82.2: ***Acceptance of Invitation – Step 3.***

STEP 4: To accept the invitation and be granted appropriate permissions to the mailbox, the Invited User must select the "***Accept***" option. A confirmation prompt will appear asking the User to confirm the acceptance of the invitation.

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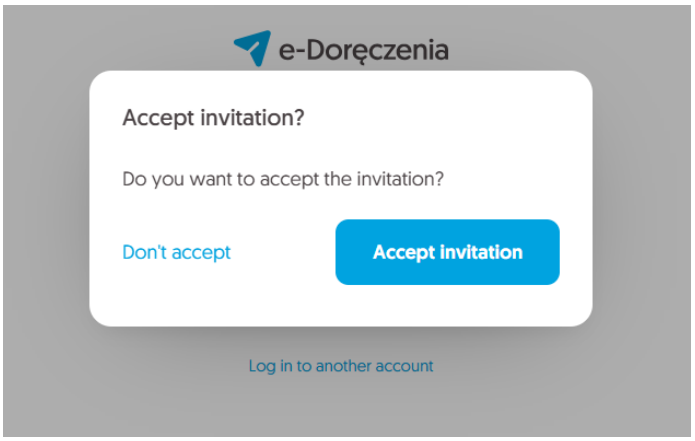

Figure 82.3: ***Acceptance of Invitation – Step 4.***

After selecting the "***Accept invitation***" option, the Invited User will gain access to the mailbox of the User who sent the invitation.

Figure 83: ***Logging into the Mailbox as an Invited User.***

In this case, after selecting the mailbox in the Invited User role, the User will be redirected to the main panel of the mailbox to which they have just been granted access.

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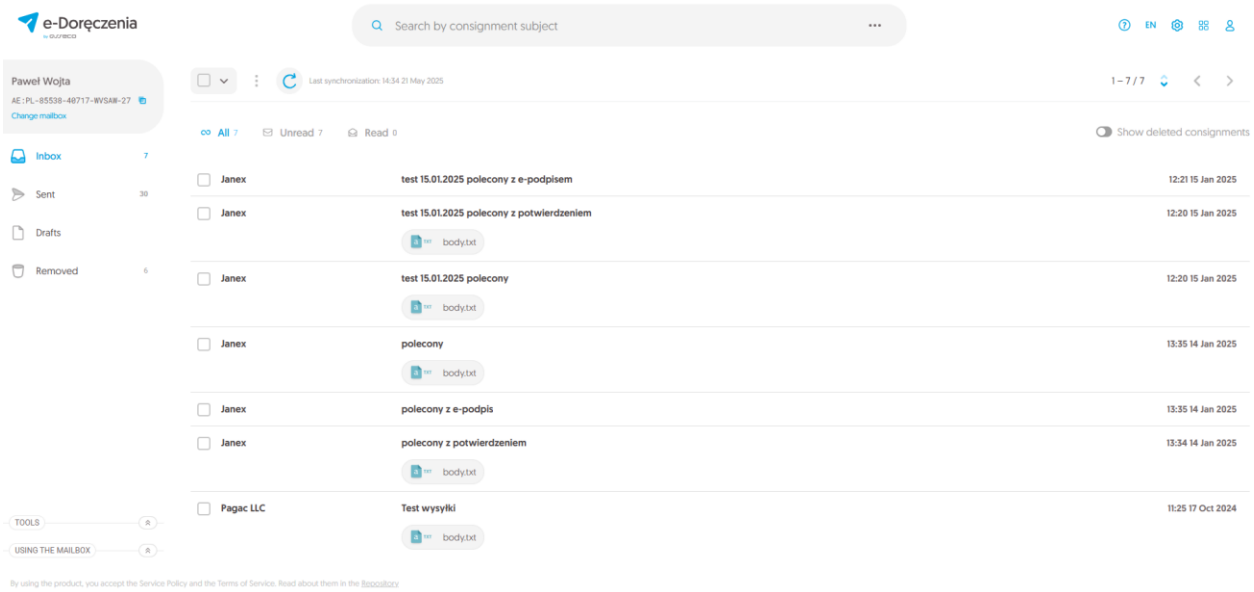

Figure 84: ***Main Panel View of the Mailbox for the Invited User.***

10.2.3 Rejection of an invitation by the Invited User

After receiving the invitation, the Invited User must log into the system, where they will have the option to accept or reject the invitation. To reject the invitation, the User must select the "***Reject***" option. A confirmation prompt will appear asking the User to confirm the rejection of the invitation. Once the rejection is confirmed, the invitation will be canceled, and access to the User's mailbox will not be granted.

10.2.4 Invitation withdrawal

Until when can an invitation be withdrawn?

This option is available until the Invited User either accepts or rejects the invitation, and no later than 10 days from the moment the invitation was sent. If the Invited User takes no action within 10 days, the invitation will be automatically canceled.

STEP 1: To withdraw an invitation, go to the "***Settings***" option and open the "***Users***" tab. In the "***Invitations and authorizations***" section, a list of authorized and invited Users will be displayed. Next to the name of each invited User, there is an option to "***Withdraw invitation***".

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STEP 2: After selecting the "***Withdraw invitation***" option, a confirmation prompt will appear.

STEP 3: After confirmation, the invitation will be withdrawn and the User whose invitation was revoked will receive an appropriate notification via email.

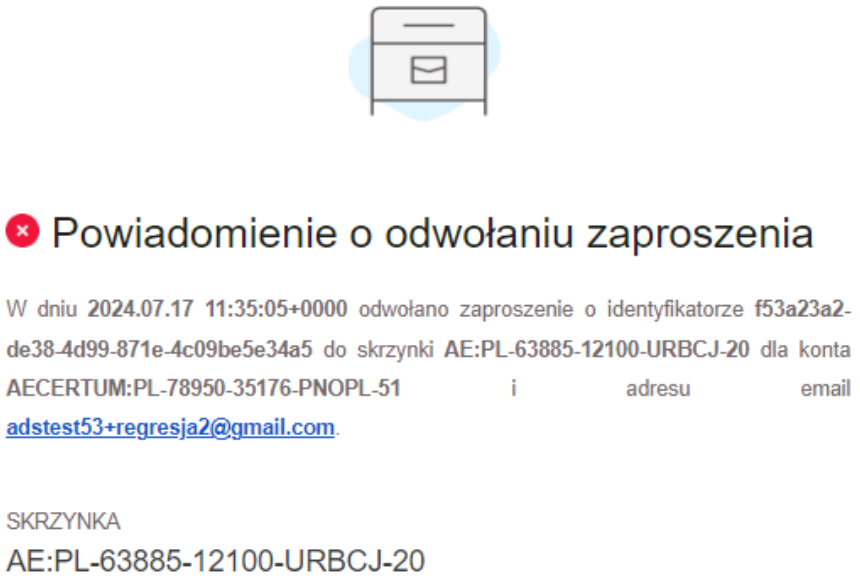

Figure 85.2: ***Withdrawing an Invitation – Step 3.***

STEP 4: For the User who withdrew the invitation, the invitation will disappear from the list in the "***Invitations and authorizations***" section of the "***Users***" tab under the "***Settings***" option.

10.2.5 Suspension/modification of an invitation

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STEP 1: A User who granted access to an invited person may suspend or modify the invitation. Suspension results in the invited person losing access to the User's mailbox. Modification allows the change of authorizations level of the invited User. To suspend or modify an invitation, go to the "***Settings***", then to "***Users***" tab, and navigate to the"***Invitations and authorizations***" section.

STEP 2: Then, in the row corresponding to the selected invitation, click the gear icon at the end of the row. Parameters related to the invitation will be displayed.

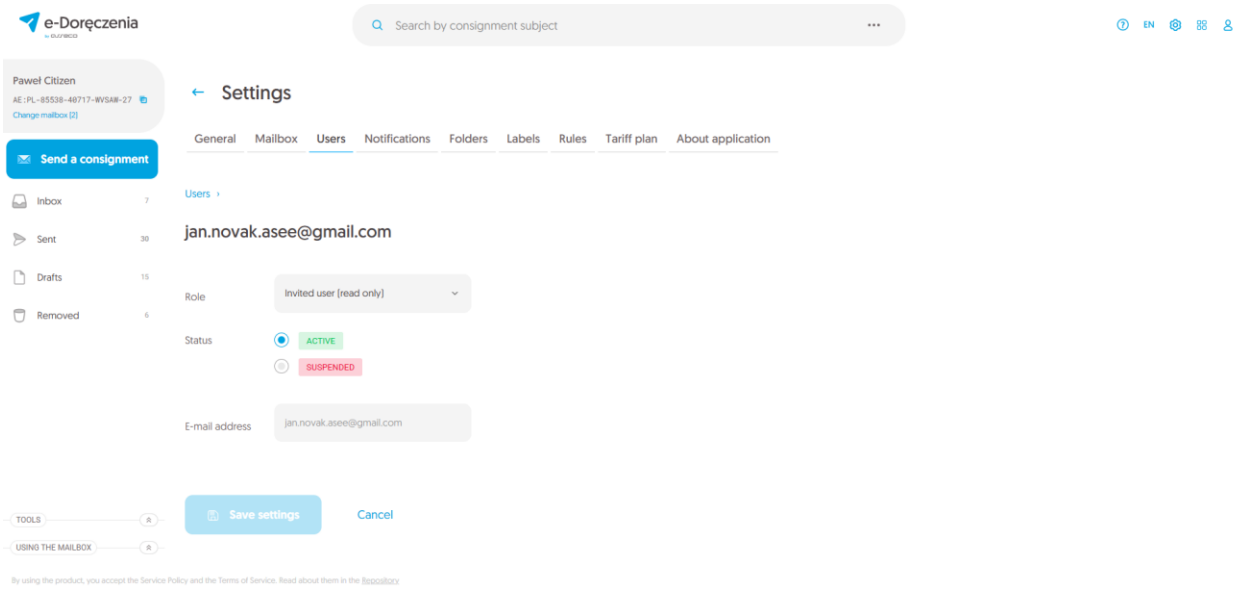

Figure 86.1: ***Suspension/modification of invitation – Step 2.***

The following parameters can be changed:

- "*Role*" – allows changing the role assigned to the invited User;
- "*Status*" – allows suspending or reactivating the invitation.

STEP 3: After changing the invitation parameters, the "***Save Settings***" option will become active.

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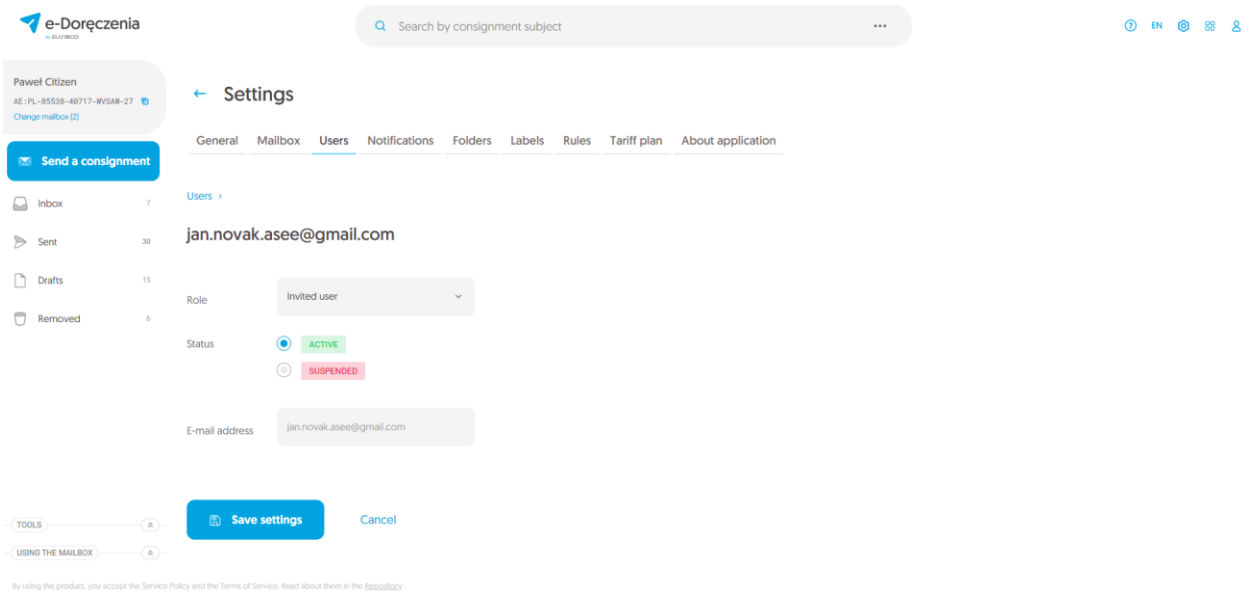

Figure 86.2: ***Suspension/modification of invitation – Step 3.***

STEP 4: After selecting the "***Save settings***" the system will return to the list of invitations, where the changes will be visible.

10.3 Actions related to authorizing other users

10.3.1 Authorizing a User

STEP 1: To authorize another User to access your mailbox, go to the "***Settings***" option, then the "***Users***", and navigate to the "***Invitations and authorizations***". To grant authorization, click the "***New person***" button.

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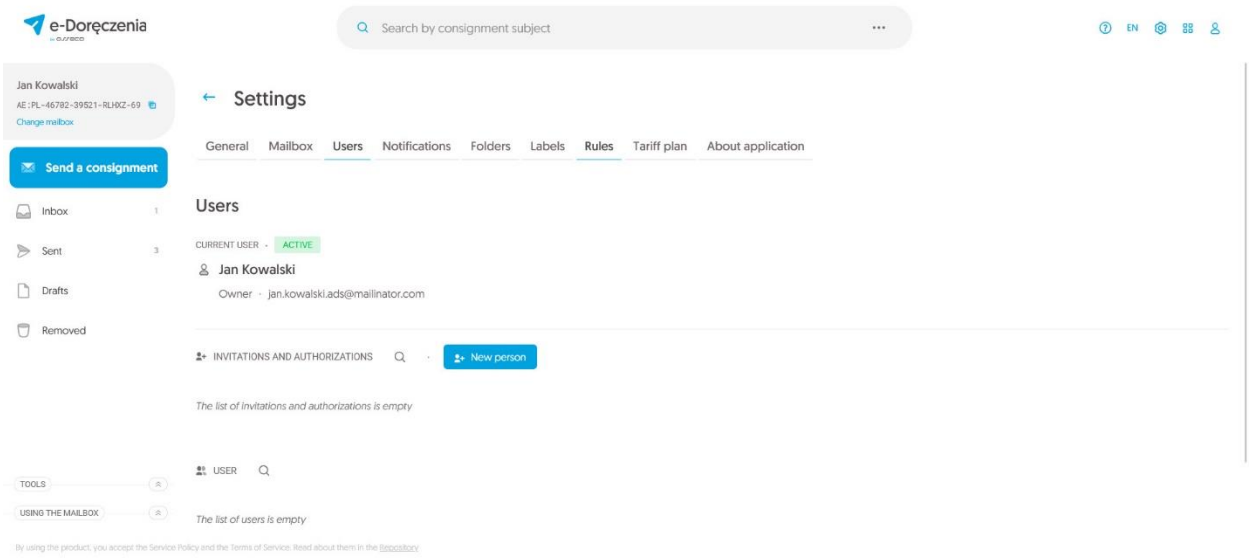

Figure 87: ***Authorizing a User – Step 1.***

STEP 2: A form will appear allowing you to send an invitation or grant authorization to access your mailbox. Select the "***Authorize***" tab as shown in the illustration below.

Then define the following parameters one by one:

- Email address of the User to be authorized;
- Type of identification of the User to be authorized – select one of the following:
  - National Identification Number (PESEL);
  - Identity document number;
  - Login;
- Role of the User to be authorized – choose one of the following:
  - Authorized administrator;
  - Authorized administrator (read-only);
  - Authorized user;
  - Authorized user (read-only);

After entering all the required data, select the "***Authorize***" option.

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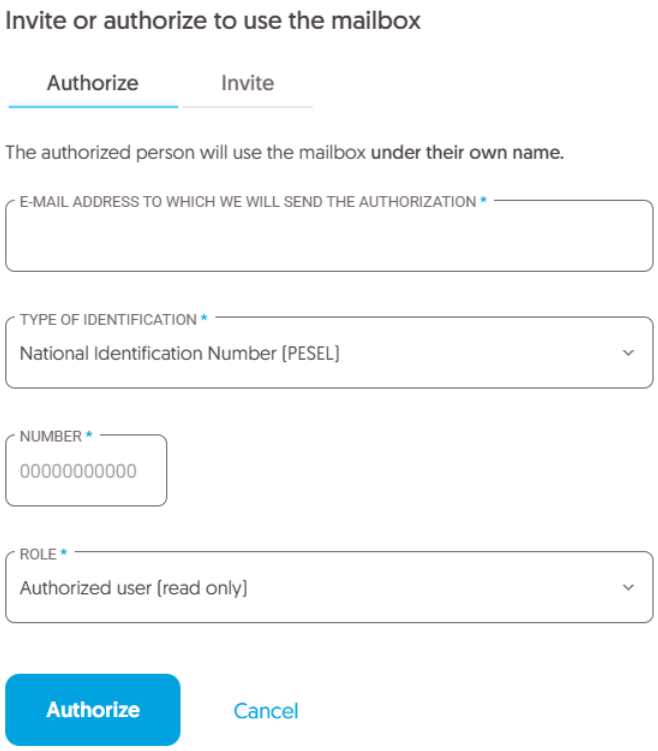

Figure 88.1: ***Authorizing a User – Step 2.***

STEP 3: In the account of the User who granted the Authorization, information about it will appear in the "***Invitations and authorizations***" section.

10.3.2 Acceptance of the authorization by the authorized person

---

STEP 1: An email notification will be sent to the email address of the User being authorized, informing them of the invitation to gain access to the User's mailbox.

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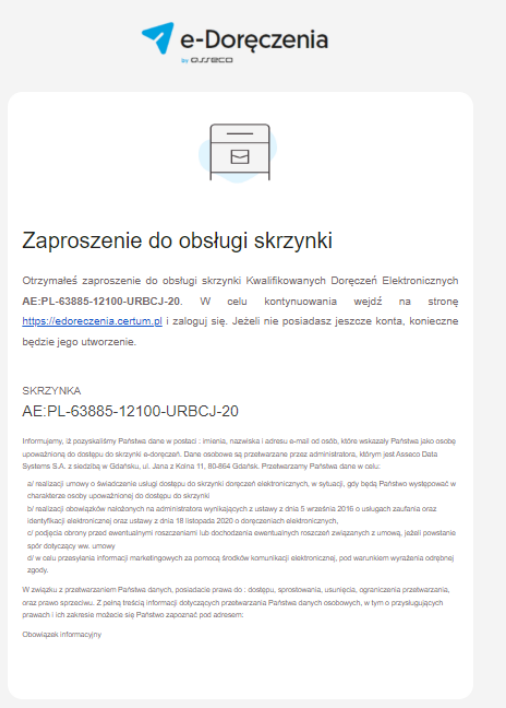

Figure 89: ***Authorization Acceptance – Step 1.***

STEP 2: After clicking the link in the email, the User will be redirected to the login page of the service.

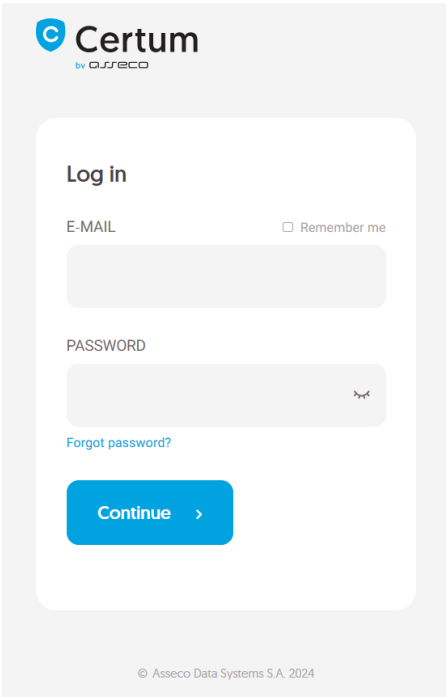

Figure 89.1: ***Authorization Acceptance – Step 2.***

STEP 3: The User who is being authorized must log into the system and either accept or reject the authorization. The rejection process is described in the following subsections.

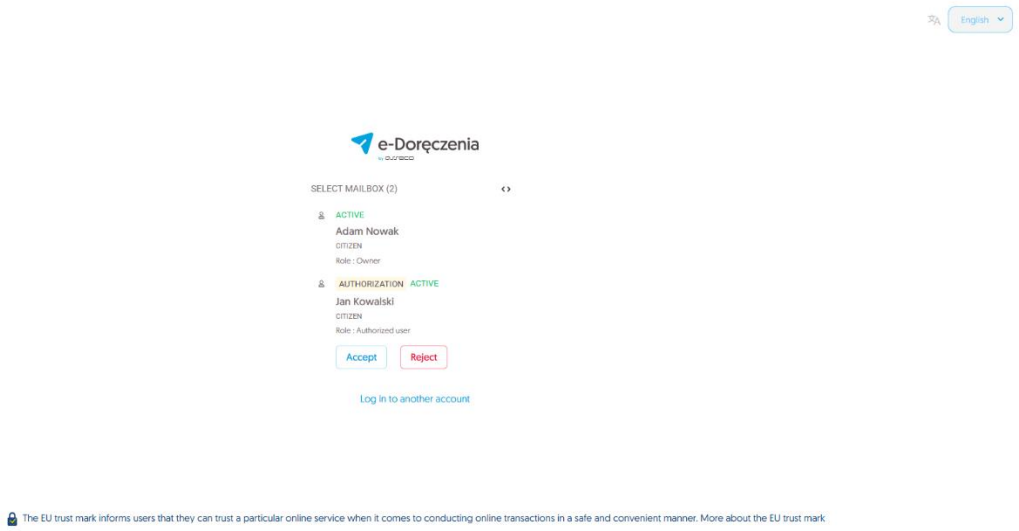

Figure 89.2: ***Authorization Acceptance – Step 3.***

STEP 4: The authorization acceptance process consists of several steps. In this step, the User must confirm their intention to accept the authorization.

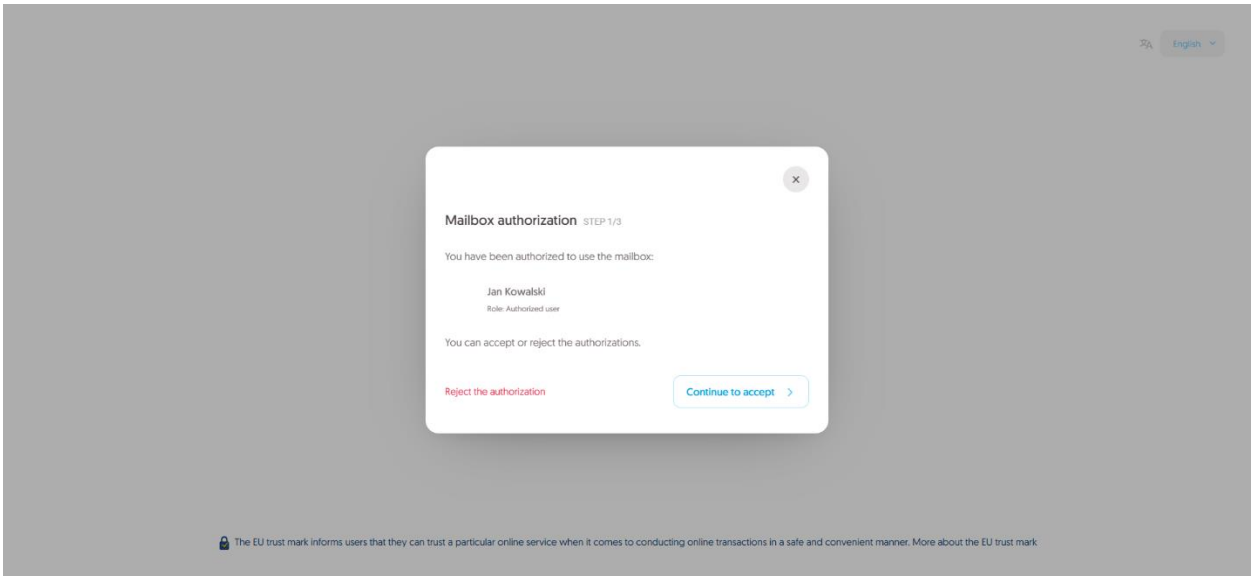

Figure 89.3: ***Authorization Acceptance – Step 4.***

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STEP 5: In the next step, the Authorized User must choose which data they wish to use when accessing the mailbox and which email address should receive service-related notifications.

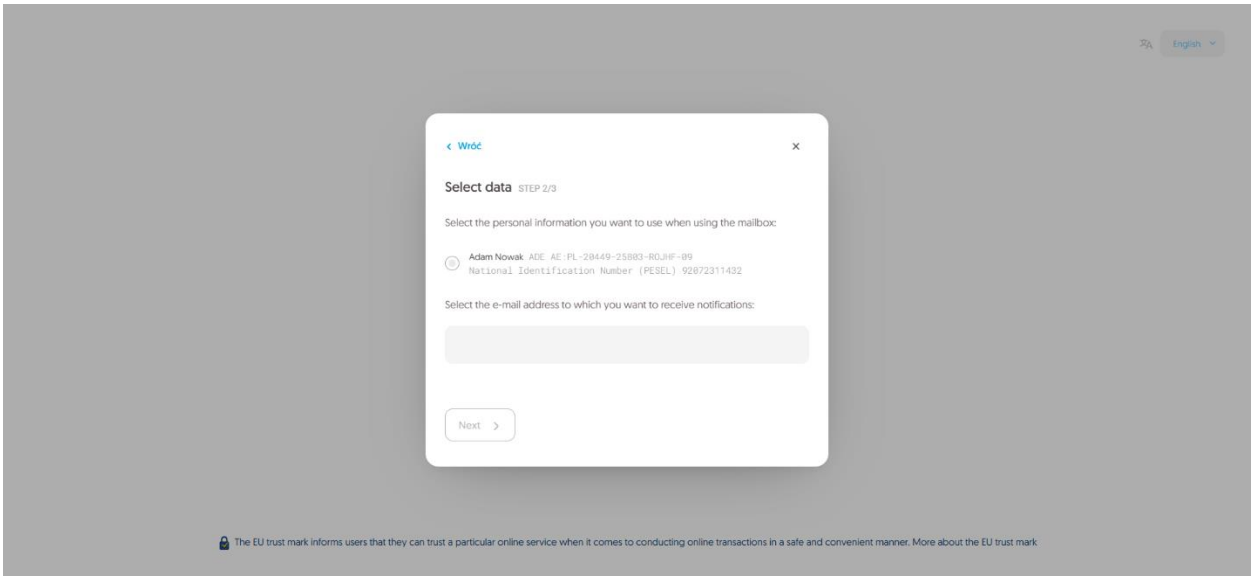

Figure 89.4: ***Authorization Acceptance – Step 5.***

STEP 6: At this stage, the Authorized User will receive a verification code that must be entered as part of the authorization acceptance process. An example of the e-mail with the code is shown below:

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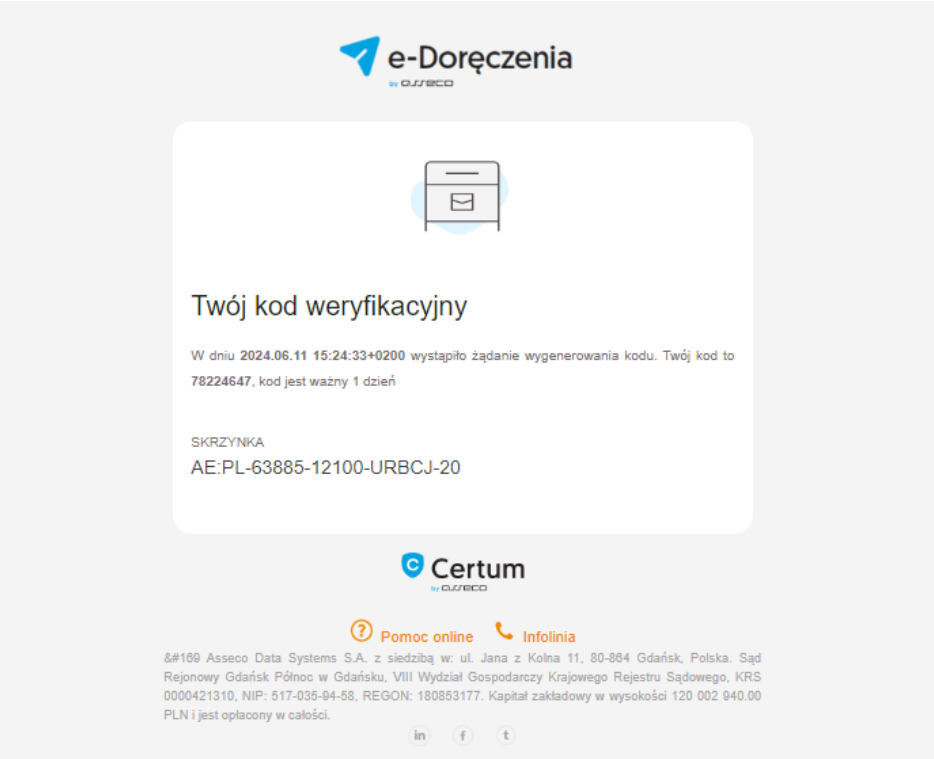

Figure 89.5: ***Authorization Acceptance – Step 6.***

STEP 7: In the modal window that appears on the website, the User must enter the verification code received via email. After entering the code, they must check the "***I accept the Terms and Conditions***" checkbox. Once this is done, the code input field will be highlighted in green and the "***Accept authorization***" option will be unlocked. To gain access to the mailbox as an authorized person, the User must accept the terms and conditions and select the "***Accept authorization***".

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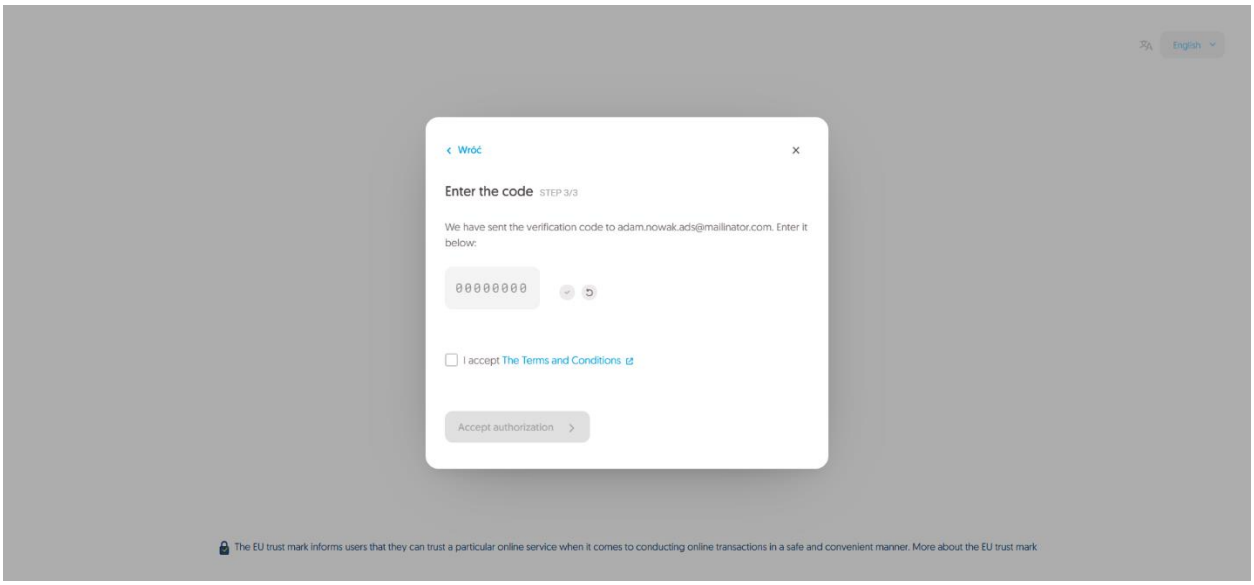

Figure 89.6: ***Authorization Acceptance – Step 7.***

STEP 8: At this point, the Authorized User can log into the mailbox they have been granted access to.

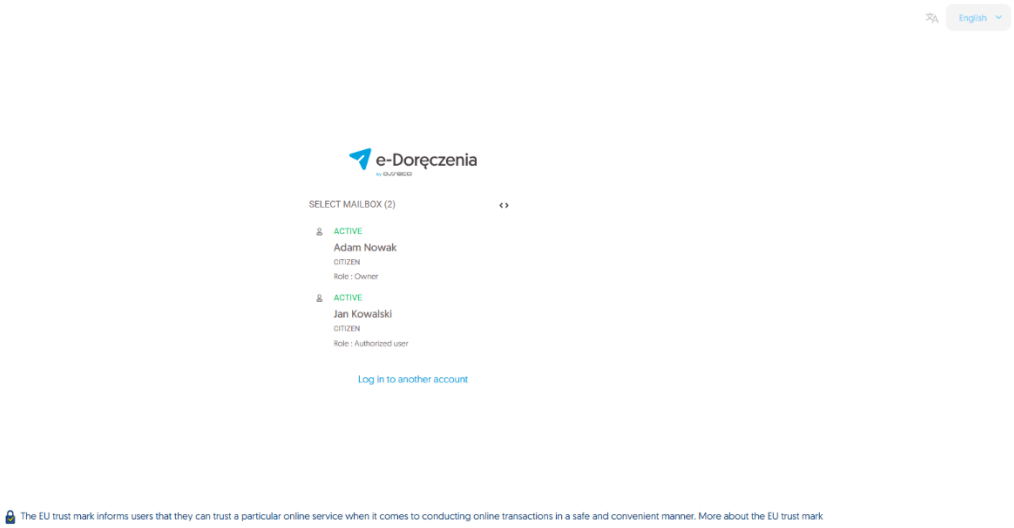

Figure 89.7: ***Authorization Acceptance – Step 8.***

STEP 9: Meanwhile, in the account of the User who sent the invitation, under the "***Settings***" option in the "***Users***" tab and in the "***Invitations and authorizations***" section, a new entry will

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appear confirming that the authorization has been granted. The authorized person will be marked as an Authorized Administrator in this case.

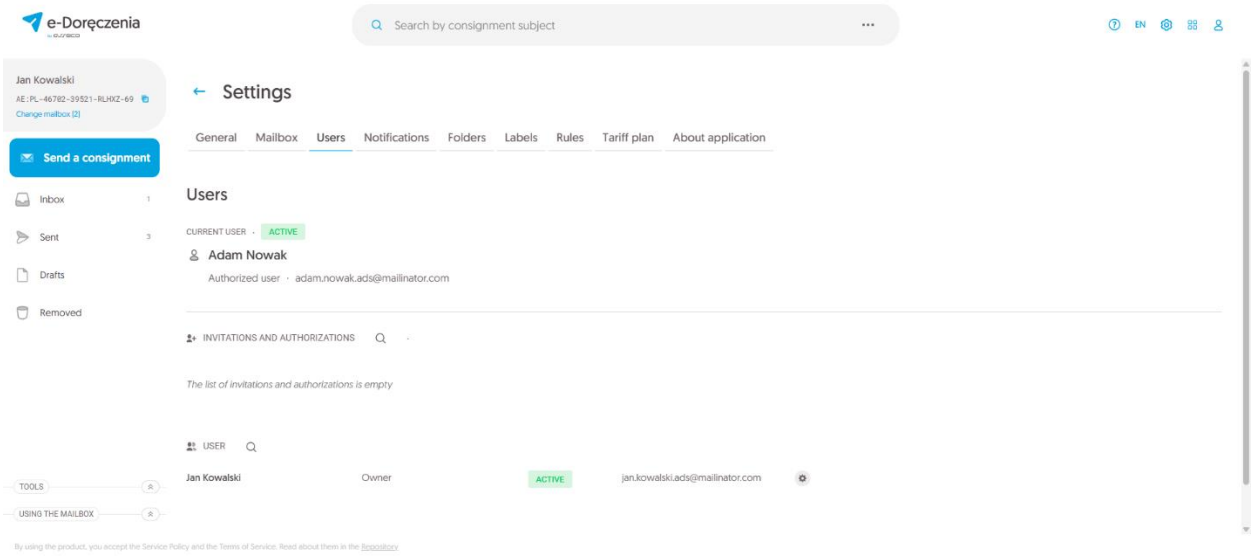

Figure 89.8: ***Authorization Acceptance – Step 9.***

10.3.3 Rejection of authorization by the authorized person

STEP 1: After receiving the authorization invitation, the Authorized User must log into the system, where they will be given the option to accept or reject the authorization. To reject the authorization, the User must select the "***Reject***" option. A confirmation prompt will appear asking the User to confirm the rejection of the authorization. Once the rejection is confirmed, the invitation will be canceled, and access to the User's mailbox will not be granted. An email notification will be sent to the email address of the User being authorized, informing them of the invitation to gain access to the User's mailbox.

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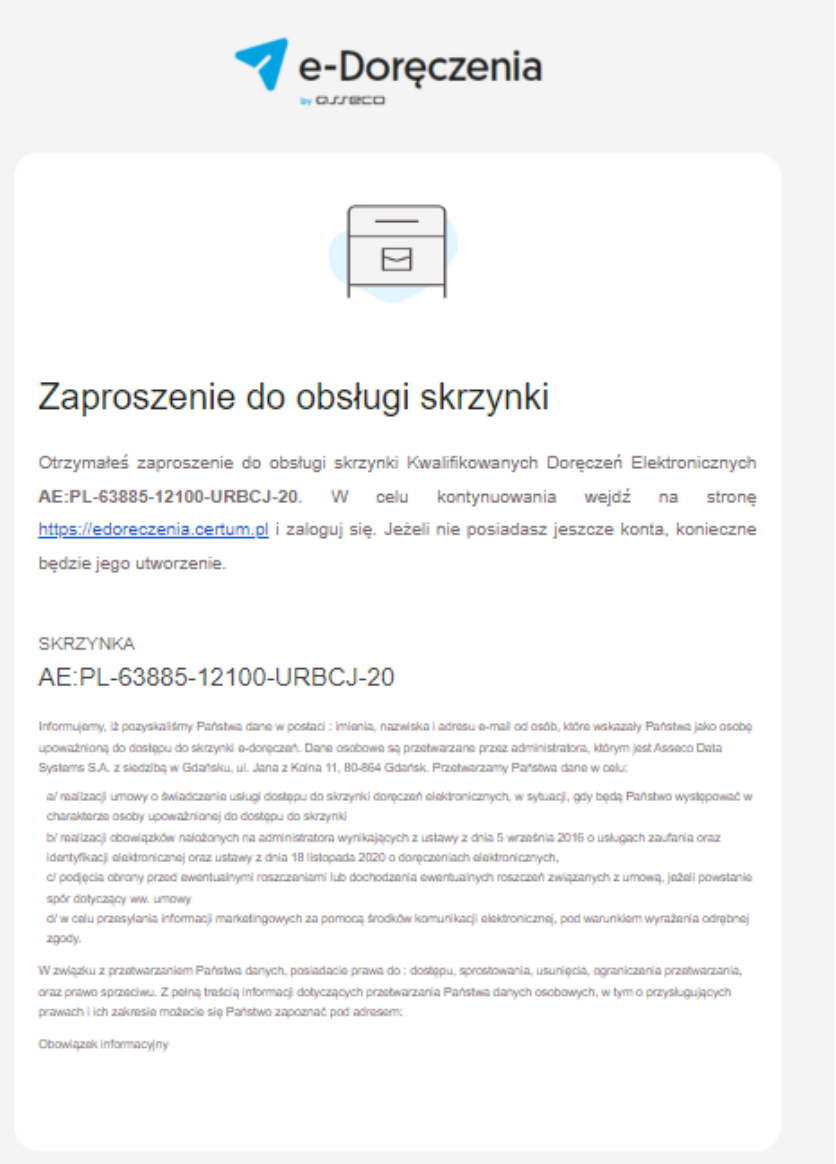

Figure 90 ***Rejection of Authorization – Step 1.***

STEP 2: After clicking the link in the email, the User will be redirected to the login page of the service.

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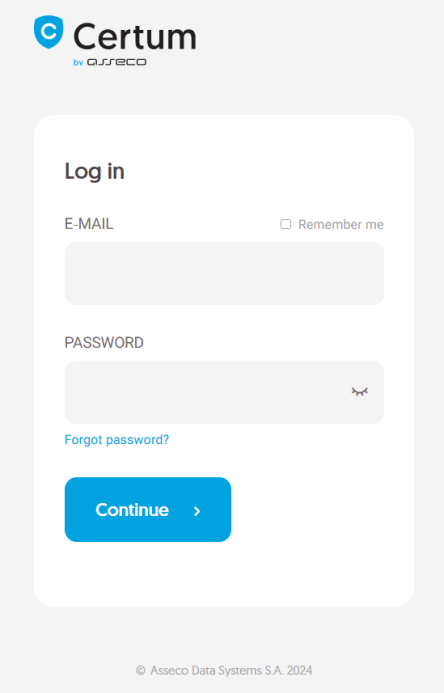

Figure 90.1: ***Rejection of Authorization – Step 2.***

STEP 3: A window will appear allowing the User to reject the authorization.

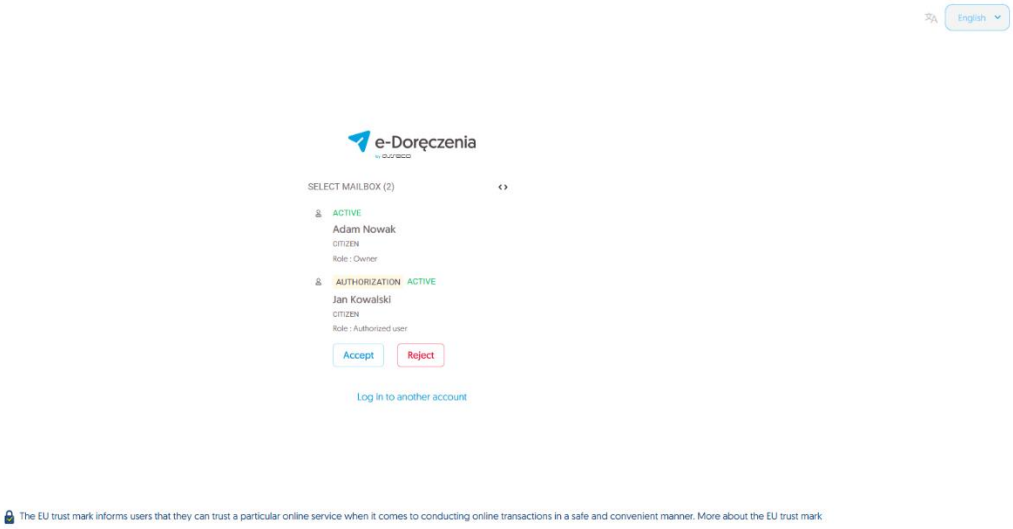

Figure 90.2: ***Rejection of Authorization – Step 3.***

STEP 4: The User being authorized must then log into the system and reject the authorization. To do this, they must select the "***Reject authorization***" option.

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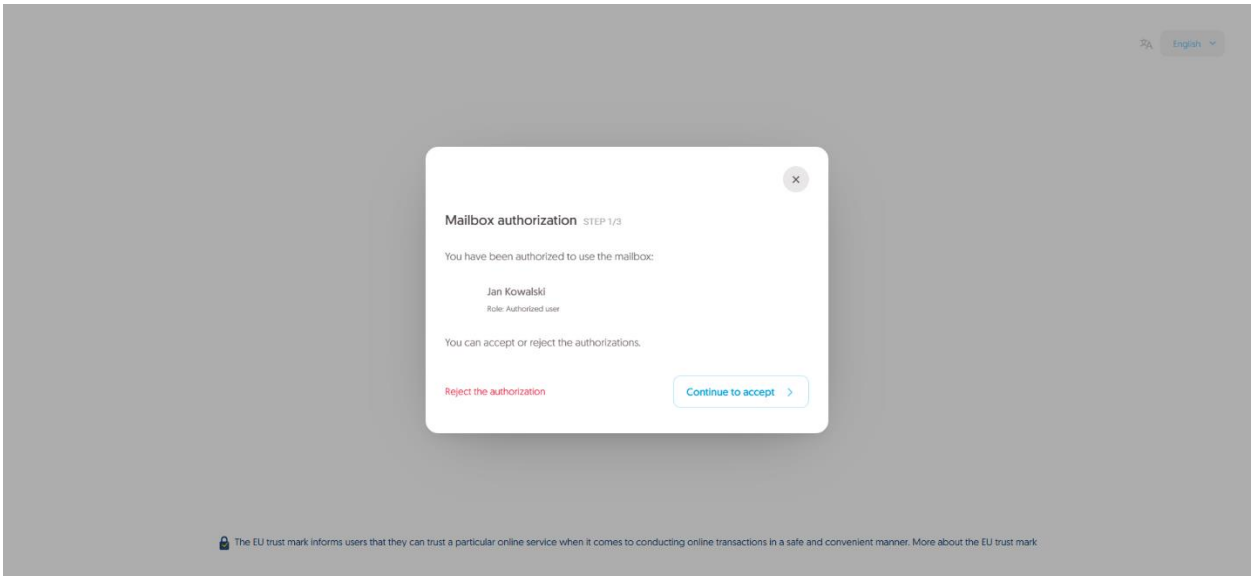

Figure 90.3: ***Rejection of Authorization – Step 4.***

10.3.4 Withdrawal of authorization

Until when can authorization be withdrawn?

This option is available until the User being authorized either accepts or rejects the authorization. If the authorizing User wishes to withdraw the authorization, they have 10 days from the time it was sent to do so. If no action is taken by the User being authorized within 10 days, the authorization will be automatically canceled.

STEP 1: To withdraw authorization, go to the "***Settings***" option to, then the "***Users***" tab. In the "Invitations and authorizations" section, a list of authorized and invited Users will be displayed. In the "***Invitations and authorization***" section, the "***Withdraw authorization***" option will appear next to the name of each authorized user.

STEP 2: After selecting the "***Withdraw authorization***" option, a confirmation prompt will appear.

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STEP 3: Once confirmed, the authorization will be withdrawn and the User whose authorization was revoked will receive an appropriate email notification.

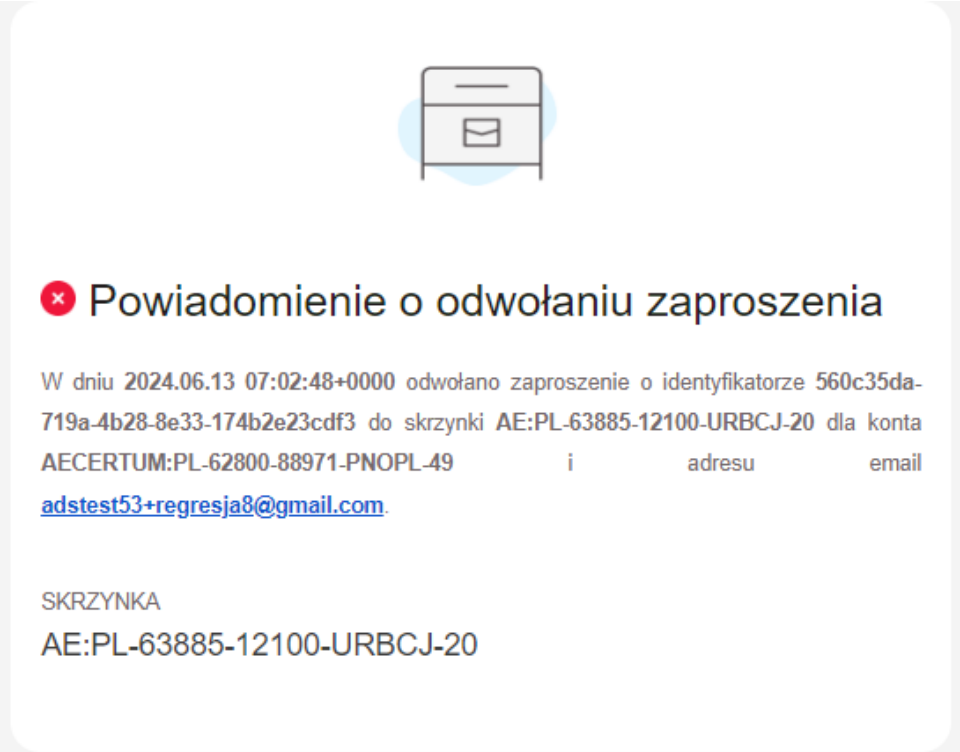

Figure 91.2: ***Withdrawal of Authorization – Step 3.***

10.3.5 Suspension/modification of authorization

STEP 1: A User who has granted authorization to another person may suspend or modify that authorization. Suspension results in the authorized person losing access to the User's mailbox. Modification allows changing the permission level of the Authorized User. To suspend or modify an authorization, go to the "***Settings***" options, then to the "***Users***" tab and navigate to the "***Invitations and Authorizations***" section.

STEP 2: Next, in the row corresponding to the selected authorization, click the gear icon located at the end of the row – the parameters associated with the granted authorization will be displayed.

The following parameters can be changed:

- "*Role*" – allows changing the role assigned to the Authorized User;
- "*Status*" – allows suspending or reactivating the authorization.

STEP 3: After changing the authorization parameters, the "***Save settings***" option will become active.

STEP 4: After selecting the "***Save settings***" option, the system will return to the list of authorizations, where the changes will be visible.

11 Reports

In Certum e-Delivery system, it is possible to generate usage reports for the mailbox. To do this, go to the "***Settings***" section, select the "***Mailbox***" tab, then click the "***Mailbox actions***" button and choose the "***Mailbox usage report***" option.

Reports are divided into:

- Detailed monthly report
- Summary monthly report
- Audit log

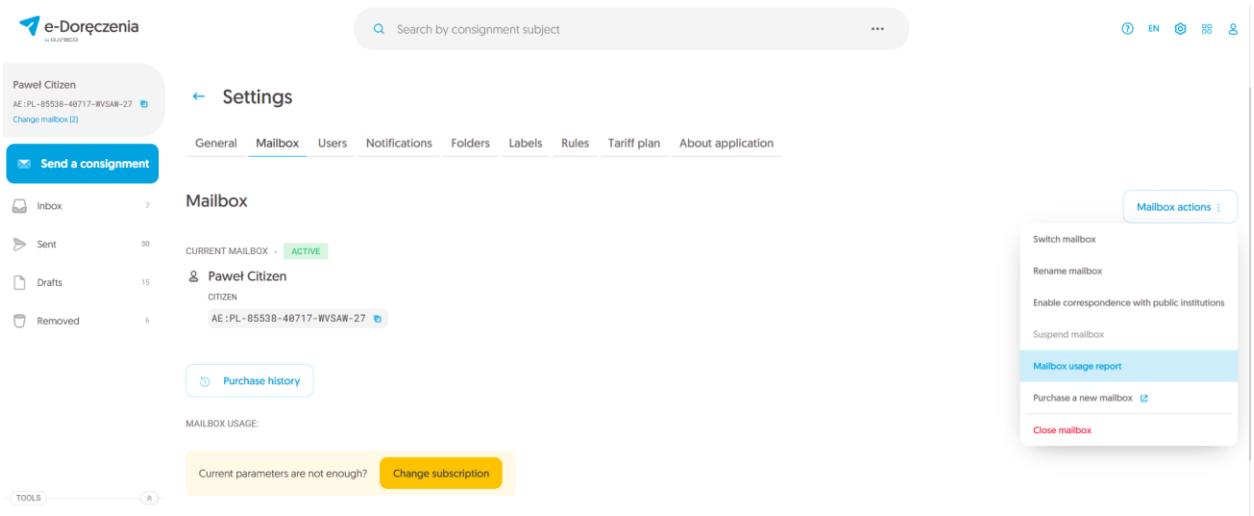

Figure 92: "*Mailbox Usage Report*"

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11.1 Detailed monthly report

The detailed monthly report includes the following information:

- Report name
- Report generation date
- Identifier of the person who generated the report
- ADE address of the mailbox covered by the report
- Month covered by the report
- Balance sections:
    - Number of messages available at the beginning of the report period
    - Number of messages available at the end of the report period
    - Consignments sent to non-public entities:

      Chronological list with the following information:
      - Time of event
      - ADE address of the recipient
      - Mail ID

    - Consignments sent to public entities

      Chronological list with the following information:
      - Time of event
      - ADE address of the recipient
      - Mail ID

    - Sending errors to non-public entities:

      Chronological list with the following information:
      - Time of event
      - ADE address of the recipient
      - Consignments ID

    - Sending errors to public entities:

      Chronological list with the following information:
      - Time of event
      - ADE address of the recipient
      - Consignments ID

    - Consignments received

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Chronological list with the following information:
- Time of event
- ADE address of the sender
- Consignments ID

- "Top-ups"

  For each event, the following information is displayed:
  - Time of event
  - Event name
  - Top-up volume (number of mails)

- "Activations, changes, and subscription renewals".

  For each event, the following information is displayed:
  - Time of event
  - Event name ("subscription activation" OR "subscription renewal/change")
  - Number of consignments at the time of the event

Report generation process includes a few simple steps:

1. Selecting the report type: summary,
2. Setting the month for which the report will be generated,
3. Selecting the export format. Available formats: pdf and csv.
4. Click the "***Generate report*** " button,
5. save the report.

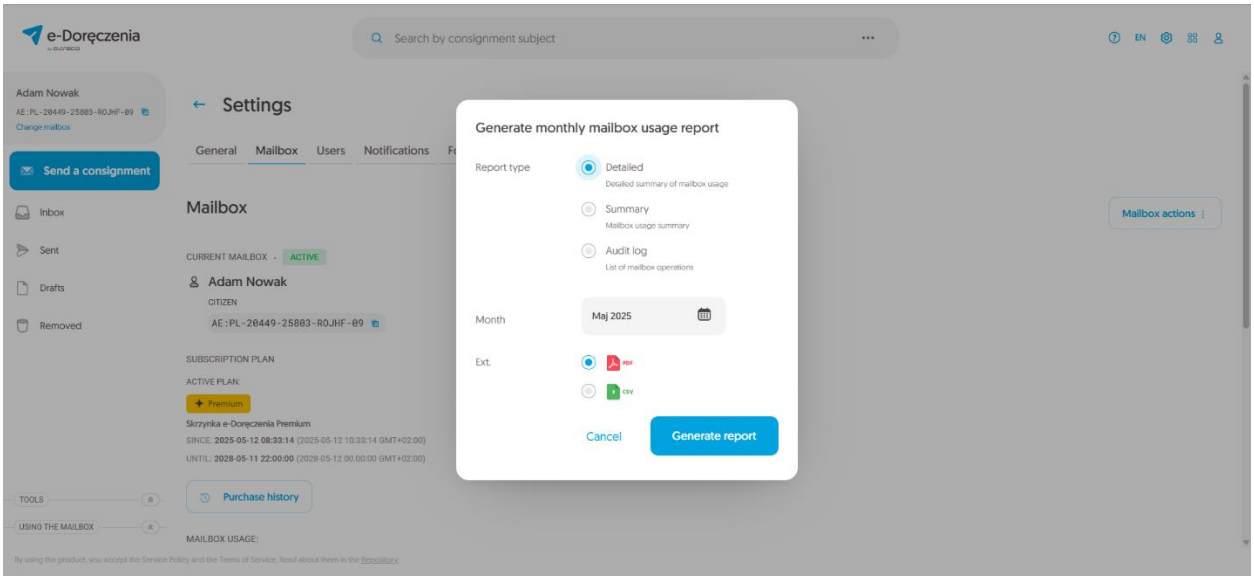

Figure 93: "*Mailbox Usage Report – Detailed Monthly Report*".

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11.2 Summary monthly report

The summary monthly report includes:

- Report name
- Report generation date
- Identifier of the person who generated the report
- ADE address of the mailbox covered by the report
- Month covered by the report
- Balance sections:
    - Number of messages available at the beginning of the report period,
    - Number of messages available at the end of the report period,
    - Number of messages sent to non-public institutions,
    - Number of messages sent to public institutions,
    - Number of messages received.

Report generation process includes a few simple steps:

1. Selecting the report type: summary,
2. Setting the month for which the report will be generated,
3. Selecting the export format. Available formats: pdf and csv.
4. Click the "***Generate report*** " button,
5. save the report.

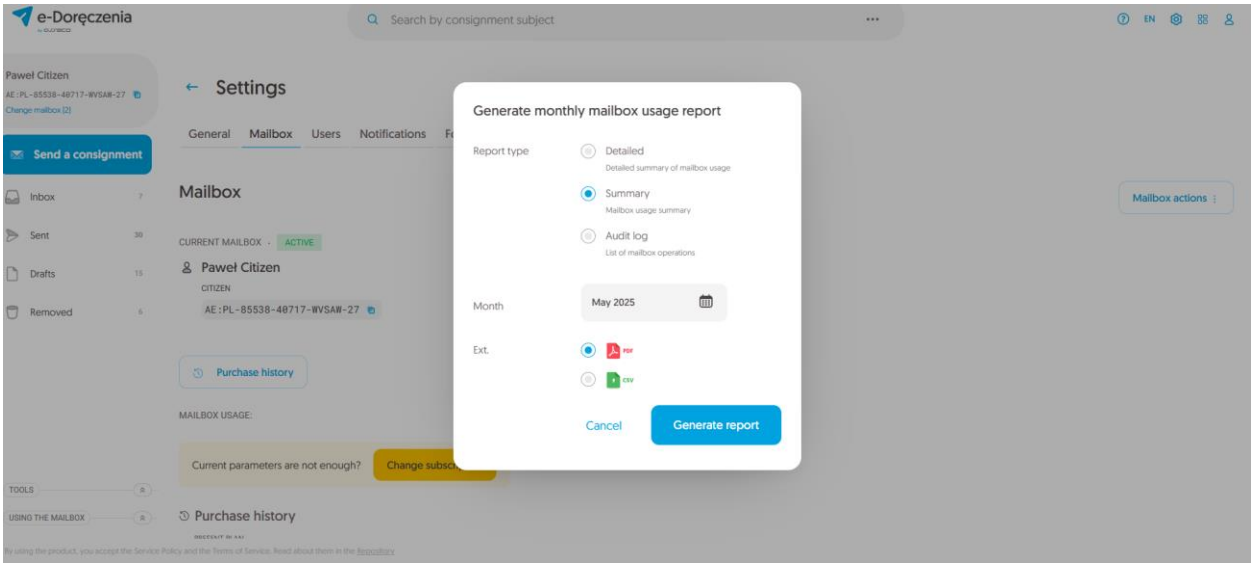

Figure 94: "*Mailbox Usage Report – Summary Monthly Report*".

certum.pl
infolinia@certum.pl

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11.3 Audit log

The audit log report includes:

- Timestamp
- Event name

Report generation process includes a few simple steps:

1. Selecting the report type: summary,
2. Setting the month for which the report will be generated,
3. Selecting the export format. Only one format is available: json
4. Click the "***Generate report*** " button,
5. save the report.

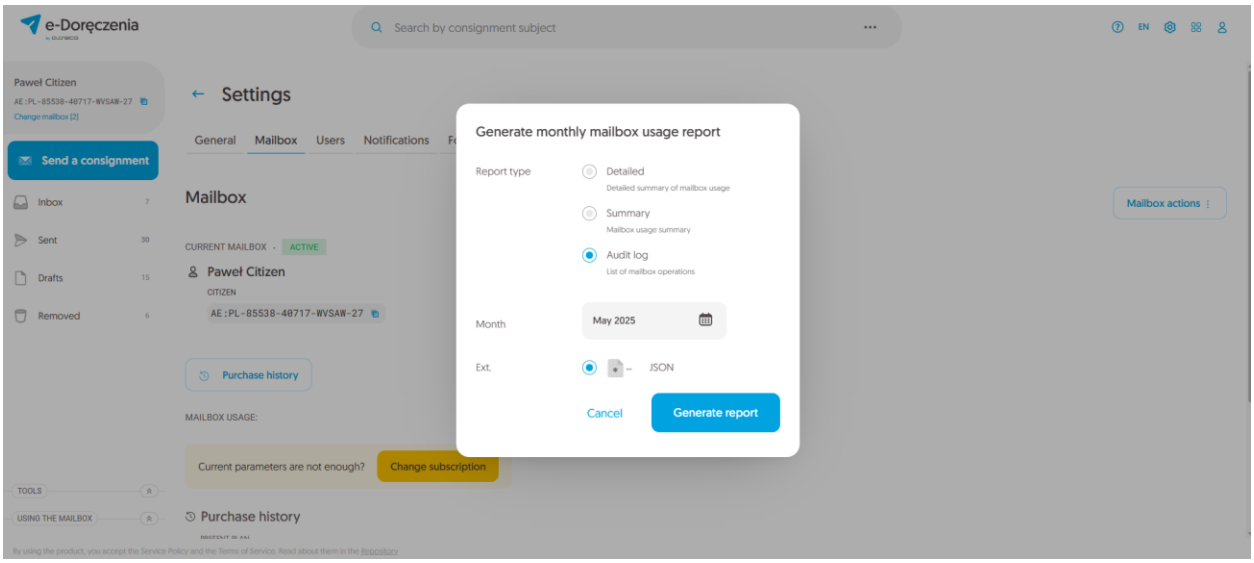

Figure 95: "*Mailbox Usage Report – Audit Log*".

12. Correspondence with other institutions

Enabling correspondence with other institutions is located in the "***Settings***" section, under the "***Mailbox***" tab.

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Then, click the "***Mailbox actions***" button and select the "***Enable correspondence with public institutions***" option.

A window will appear where you can choose one of the following options:

- **CONSENT** to correspondence with public institutions.
- **WITHDRAW CONSENT** to correspondence with public institutions.

ATTENTION!

Changes to correspondence settings with other institutions may not take effect immediately

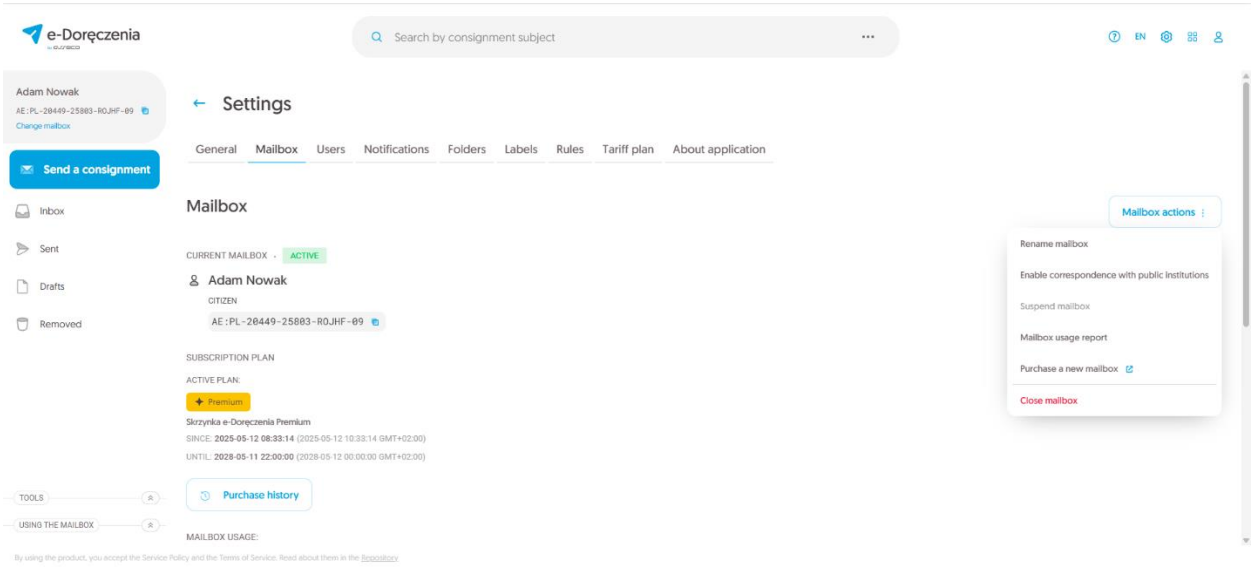

Figure 96: "*Enable correspondence with public institutions" – Step 1*.

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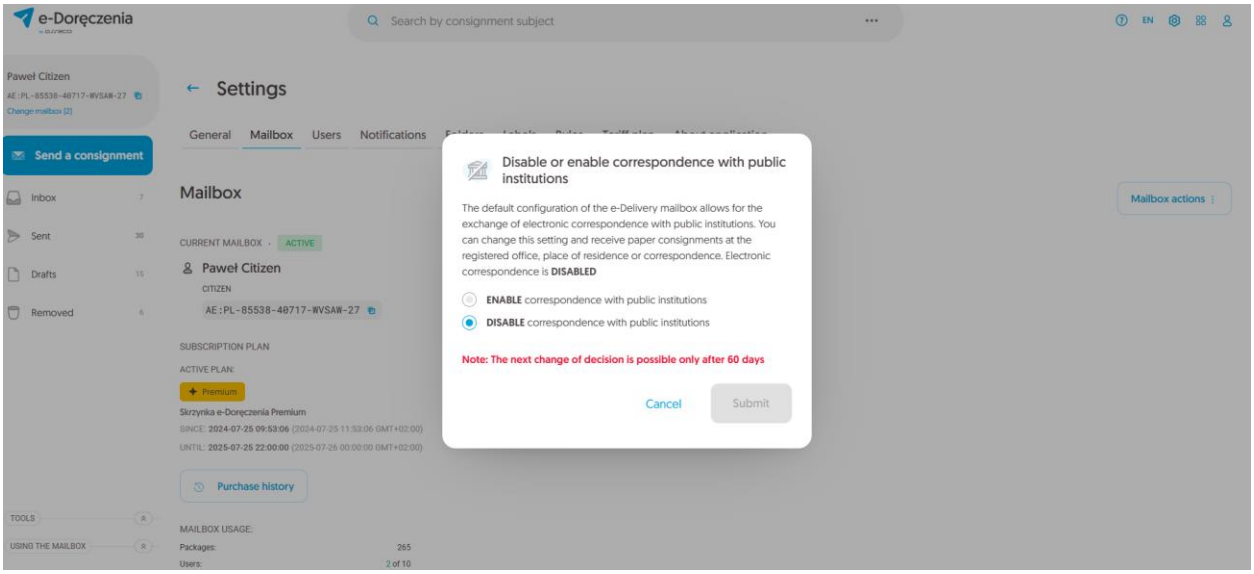

Figure 97: "*Enable correspondence with public institutions" – Step 2*..